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ABSTRACT

This report, one of a series of nine studies examined key issues in education and training (E&T) and access to information among adults aged 50 in the United Kingdom. Various statistical sources, existing literature, and several small-scale field studies were used to examine current participation of older adults in formal and informal E&T, future demand for E&T, contributions and costs of E&T for older adults and barriers to E&T, and key policy issues and options. It was concluded that older adults' access to education has increased during the past decade but remains fragmentary and strongly affected by social class and educational background. It was further concluded that several factors will increase demand for E&T among older adults but that attitudinal, financial, transportation, and time constraints will remain barriers to older adults' participation in E&T. Several public policy options were identified: increasing spending on training of older workers, safeguarding/strengthening adult education provision by local authorities, supporting libraries as agents in effective provision of information/guidance to older adults, and considering an education entitlement for older adults. (Contains 93 references. Appended are summaries of the nine field studies.) (MN)

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THE CARNEGIE INQUIRY
INTO THE THIRD AGE

ED 379 410

Research Paper Number 3

LEARNING:
Education, Training and Information in The Third Age

Tom Schuller and Anne Marie Bostyn

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The table below lists the nine studies carried out for the Inquiry, the research institutes and the funders.

Study	Research by:	Funded by:
1. Employment	Public Finance Foundation assisted by: Policy Studies Institute Institute of Manpower Studies Institute for Employment Research	British Telecom Department of Employment
2. Income	Institute for Fiscal Studies	Department of Social Security Institute of Personnel Management Carnegie UK Trust
3. Learning	Centre for Continuing Education, Edinburgh University	Baring Foundation Paul Hamlyn Foundation
4. Leisure	Centre for Policy on Ageing	Allen Lane Foundation Carnegie UK Trust
5. Homes & Travel	Age Concern Institute of Gerontology King's College, London	Joseph Rowntree Foundation
6. Caring	Age Concern Institute of Gerontology, King's College, London	Carnegie UK Trust
7. Volunteering	The Volunteer Centre UK	Tudor Trust
8. Citizenship	Centre for Policy on Ageing	Calouste Gulbenkian Foundation
9. Health	Nuffield Department of Clinical Medicine, Oxford University	Nuffield Provincial Hospitals Trust

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LEARNING:
Education, Training and Information in The Third Age

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Centre for Continuing Education
University of Edinburgh

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FOREWORD

The Carnegie Inquiry into The Third Age was launched by the Carnegie UK Trust in 1990 to consider issues affecting the life, work and livelihood of people who have finished their main job or career, or bringing up their children, or both, but who may have 20 or more years of healthy, active and independent life ahead of them. People enter and leave this stage of their lives at very different ages, and for an individual the transitions may not be clear cut. For statistical purposes we have used the age range of 50-74. This age group is already a quarter of the population of the United Kingdom. Our studies have shown that it is a very diverse group, and whilst many people enjoy great freedom, health and prosperity, others face poverty, isolation and lack of choice; their talents and experience are all too often wasted. Changes of policy, and of attitude, are needed, if the full potential of the third age - for individuals and for society - is to be realised.

Statistics often ignore the third age, grouping 60 year olds with school leavers and healthy 65 year olds with the very old and frail. The Inquiry set out to establish current facts and trends through nine research projects, ranging from large studies of employment, income and learning, to rather more limited work on volunteering, caring, health and homes and travel, and small desk studies of leisure and citizenship. In each case the implications of the research findings have been discussed with policy makers and interest groups, opportunities and areas of concern identified, and policy options suggested. In addition, special work was undertaken on Irish and EC perspectives.

This report is thus one of a series of nine studies intended to fill many of the gaps in current knowledge and launch a public debate on third age policy issues. The views expressed are those of the authors. Drawing on these nine studies, the Advisory Committee (listed on inside back cover) will produce a final Inquiry report setting out their conclusions and recommendations; this will be presented to a major conference in April 1993. This is the EC Year of Older People and Solidarity between Generations.

Mrs Terry Banks

Director, Carnegie Inquiry into The Third Age

September 1992

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This report has been produced with the help of many people. We have drawn on the responses and contributions of educators, researchers, volunteers, students and potential students too numerous to name or even list by affiliation. Many of these will see only traces of their contributions if that. We hope that they will continue their contributions by debating the outcome. The Working Group overseeing the project have provided invaluable support, patiently commenting on several drafts and contributing their time most generously. Barry Till chaired the Group most helpfully. Special thanks are due to the Baring Foundation and the Paul Hamlyn Foundation which funded the Report; and to Terry Banks for guiding us so skilfully. Norma Hurley, Christine Tillsley, Joan Weir (freelance consultants), Diane DeBell (Norwich City College) and Graham Murdock (Loughborough University) contributed separate studies which have been integrated into the text. Bernard Casey and Trevor Jones at the Policy Studies Institute carried out the data analysis of the Labour Force Survey. Finally, without Jenny Jedrej's unfailing competence in coping with endless redrafts, the report would never have appeared.

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SUMMARY

1. Background and General Aims

1.1 This report seeks to:

- give an account of current participation by third agers in formal and informal learning activities
- identify the key issues involved in education, training and information for older adults
- suggest policy options.

It draws on a variety of statistical sources; existing literature; and a number of small-scale specifically conducted studies, including consultation with older learners.

1.2 The overall title of the report is 'learning'. The report begins with formally organised learning opportunities provided by the education system and by training institutions. But it extends to cover a range of ways in which adults learn without attending courses or classes, especially the use of information of various kinds. If learning is the title, personal enrichment and individual enablement are the keywords.

1.3 The report advocates a framework of lifelong learning rather than the concentration of educational opportunity into the early parts of life. Whilst the term 'lifelong learning' may be familiar, even banal, in educational circles, it is far from being a political reality. Fresh policies on the third age can lead the way towards a genuine learning society for all. A principal theme of the report is that policies for learning in the third age cannot be separated from policies for society as a whole.

2. The Current Position

2.1 The starting point is that the **great majority of those currently in, or just entering, the third age had minimum initial schooling and have had very few opportunities for continuing education. Roughly two out of three of those aged over 50 left school at 15 or earlier, and have never obtained any formal qualifications.** Each successive generation has more access to education, but older generations have not caught up.

2.2 From that low base, we estimate that **about three quarters of a million third agers enrol annually in some kind of formal adult education, and a similar number receive some kind of organised training.** Given that there are about 14 million people aged over 50 in the UK, this means that roughly **1 in 10 of the age group take part each year in formal learning**. In addition, at least the same number of older adults – and probably many more – engage in informal learning, that is activities which involve an intention to learn but which are not formally designated as such.

2.3 Key selected findings are:

- Over the last decade there has been an overall increase in access by older people to education and training, but it remains fragmentary.
- Social class and educational background strongly affect access. People with higher educational qualifications are many times more likely to participate in training than those with no qualifications – five times as likely if they are men, nine times if they are women. Access to adult education is also unequal, though to a slightly lesser extent.
- Older women who are in employment are more likely than older men to receive training. Women also participate more in non vocational education.
- Educational provision covers a wide range with many examples of good practice. The core of adult education for third agers is provided in local authorities and is now under significant threat.
- Higher education, apart from the Open University and university extramural departments, has paid little attention to the needs of older people.
- Training opportunities for older people are extremely low by any standards: 9 out of 10 older employees receive no training at all. Occasional initiatives to encourage skill development amongst older workers remain isolated and unsupported.
- Pre-retirement education covers only a small percentage of the working population, and often inadequately.
- Training for older workers is crucial if the learning habit is to be acquired for life after work.
- Information comes from a wide variety of sources, but is unevenly distributed and often inefficiently used.
- Libraries have a crucial part to play in furnishing local access to information sources and technologies.
- TV and radio are key vehicles for learning opportunities for older people, bridging formal and informal learning. Their potential in this respect is not securely developed.

3. Future Demand

3.1 We project strongly rising demand for learning amongst older people, for the following reasons:

a) the inbuilt momentum from increased levels of initial education;
b) the social climate is gradually but steadily moving in favour of continuing education. This includes the attitudes of families and peers;
c) official targets are being set for participation and achievement;
d) stereotypes about older adults and their ability/willingness to learn remain powerful, but will surely be eroded.

3.2 The important questions are not about whether older people can learn, but about the size of the increased demand and – crucially – whether there is prompt and imaginative commitment to meeting it.

4. Potential Contributions and Costs: The Social Economy of the Third Age

4.1 Three very broad conclusions can be drawn from current understanding of older people's learning abilities:

- **Some** deterioration in **some** aspects of **some** people's ability to learn occurs with age; these are largely to do with tasks which require quick responses or memory tests.
- As far as influence on learning potential is concerned, social environment and personal history far outweigh factors intrinsic to the ageing process.
- Very little is known about the developmental potential of older people – just as in earlier times very little was known about children's learning patterns. It will require a prolonged period of social effort and technological investment to uncover the latent potential.

4.2 Third agers also have enormous potential as teachers, trainers or mentors, in the workplace, in volunteer organisations or in personal capacities (e.g. as grandparents).

4.3 Third agers already contribute largely to the economy and to society, as employees, volunteer carers and citizens. If their skills and potential are ignored or discarded, there are also huge costs:

- **economically** in the loss of output, formal and informal (i.e. including unpaid work) which is not measured by GNP.
- the **health** of older people determines their level of dependency, with its social and personal as well as financial costs;
- **culturally** third agers already perform major roles in civic and public life, and as 'cultural trustees'.

4.4 We argue, therefore, for a **new social economy of the third age**, which takes into account the actual contributions made by older adults and the social and economic costs of failing to adopt positive policies.

5. Barriers to Learning

5.1 The report points to a number of barriers which impede or inhibit learning by third agers. **Attitudes** are identified as crucial: attitudes of employers, educators, government and society as a whole, but also of third agers themselves. Other factors include lack of finance, transport problems and lack of time. However the key conclusion is that these barriers are broadly the same as for all age groups, though their relative importance may vary (for instance poor health impinges more strongly on older people's motivation to learn). In short, overcoming barriers for the third age entails overcoming barriers for the second age, and vice-versa.

6. Policies: Key Themes and Options

6.1 Themes

The key policy themes identified are:

a) The need for clear **policy statements**. On their own these are of symbolic importance, but need to be supplemented by:
b) The setting of **targets** (within defined timescales), and the establishment of **monitoring** machinery.
c) Appropriate **resourcing**, whether this be at the level of a national training scheme, local authorities, an institution, or for individual students, sufficient to ensure a **broad range** of opportunities.
d) The need for **guidance and information**, specifically relating to learning opportunities but also to employment opportunities.
e) The relevance of a supportive **cultural infrastructure**, enabling older people to have effective access to the media and other resources, as contributors as well as consumers.
f) The need for **consultation** with older people and their organisations.

6.2 Key Options

The report spells out specific policy options made under 44 headings (Section 4.5), directed at national and local government, employers, educational institutions and providers of information. Many of them are intended to give practical shape to the themes identified above, on the need for policy statements, target-setting, resourcing and breadth of provision.

Amongst the key options are:

a) Governmental action simply and directly to increase spending on training for older workers. This may be through increased resources to TECs/LECs, further support for tax relief for expenditure on training or the introduction of a training levy such as they have in France.
b) Support to be given to negotiated agreements on education and training, covering as broad a range of learning opportunities as possible and building on several very promising recent initiatives such as the Ford EDAP programme.
c) Core adult education provision by local authorities to be safeguarded and strengthened. Financial formulae for local government expenditure to allow for this.
d) Support for local libraries as central agents in the effective provision of information and guidance. This to include giving third agers access to appropriate information technology.

e) Commitment to the provision of formal or informal learning opportunities to be built into the remit of TV and radio, especially in the light of proliferating channels and new regulations.

f) Consideration of a third age education entitlement. This could be considered as part of the state's basic provision for older people, alongside financial benefits such as the pension. It might be available from the age of 50 onwards, and targetted initially to those with least formal education.

1 PARTICIPATION IN EDUCATION AND TRAINING

1.1 INTRODUCTION: TERMS AND METHODS

This report is on education, training and information for members of the third age. We begin by clarifying some of the key terms and describing the report's approach and structure.

The third age is defined by the Carnegie Inquiry as the active independent stage in life after a person has finished his or her career or job, or bringing up children, or both. We refer to people in this age group as 'third agers', or 'older adults' and 'older learners'.

The report covers, as far as possible, all forms of organised education and training*. It concentrates more on formal learning than on informal on-the-job training or the informal learning which takes place in everyday life. We recognise the importance of both these ends of the spectrum, but to cover them in any detail would have meant describing virtually all the activities of older people. Learning does not take place only on courses.

Even with these limitations, the report covers a very wide range of activities and issues. Its main objectives are:

a) To give an account of **current participation** by third agers in learning activities, including the distribution of access and opportunity across different social groups.
b) To identify **key issues** in education, training and information for older adults, including barriers to participation; examples of good practice; and obstacles to development.
c) To identify **policy options** for consideration by those involved in policy-making at different levels: national, local and institutional, including employers.

The report draws mainly on three sources of information:

a) A variety of **statistical sources**. These include national published statistics; figures produced specifically for us from national data sources such as the Labour Force Survey; and published and unpublished data from other studies such as the National Institute of Adult and Continuing Education (NIACE) **Learning and 'Leisure'** study carried out in 1990 (Sargant 1991).
b) **Existing literature.** The potential range of information here is enormous (though still with some major gaps), and to attempt a comprehensive summary would have been beyond the scope of the report. Highly competent research surveys on the education and the learning abilities and process of older adults exist (see e.g. Withnall *et al* 1983, Peterson 1983, Glendenning and Percy 1990, McGivney 1990) on which this report draws where necessary.
c) We have conducted a number of **small-scale surveys**. These have been necessarily broad-based and relatively superficial, designed to elicit contributions to the policy discussion rather than to generate significant 'new knowledge'. This work consisted of:

---

*Rather than always using the dual term 'education and training', we often use the former to cover both where this causes no loss of nuance.

- surveys of providers of education and training, including colleges, universities, adult education centres and employers;
- questionnaires to educational researchers with specific knowledge of older adults;
- case studies of employers in different industrial sectors;
- a survey of voluntary organisations on the training of older volunteers;
- a questionnaire to providers of educational guidance;
- a survey of student motivation and benefits in Norfolk and Wandsworth
- group discussions with participants and non-participants, including representatives of ethnic minority groups.

> The intention has been to involve a wide range of providers and other practitioners, consumers and researchers. They were asked to respond to a brief set of questions which had a common structure (focussing on **obstacles, good practice** and **steps forward**) tailored in each case to the particular group. Details of each survey are provided in the Appendix. Response rates to the postal surveys in most cases were low and the results are not given as quantitatively significant. They represent a compromise between straightforward secondary analysis of existing material and substantial primary research which would have been beyond the scope of this study.

A further word about methodology. The literature is virtually unanimous on the need to involve older adults in the planning and delivery of education, and we subscribe to this view ourselves. How does this report match up to this aspiration? Very partially. We piloted the surveys with local third agers; the 'user' survey was designed to elicit the views of older students, necessarily in a loosely controlled way; and we involved older employees in the case studies and older members of non-participant ethnic minorities in discussion groups. None of this is sufficient for us to claim that third agers' viewpoints are fully represented. Nor will they ever be, given their heterogeneous and changing character. What we hope to have done is draw together a range of diffuse information and viewpoints to provide an initial platform for debate.

In **Three Score Years and Ten**, Mark Abrams and his colleagues draw a contrast between two generations. Their 'target' population was

> those aged 75 or more who had for the most part been born in the 19th century and spent the larger part of their lives before the burgeoning of the Welfare State in the late 1940s and early 1950s;

they were to be contrasted with a sample aged 65-74, drawn from

> a generation whose members were born in the 20th century. These people had experienced, while still in the prime of life the full blooming of the Welfare State – full employment, free medical services, paid holidays, substantial increases in real earnings, improved old-age pensions and, at the same time, very different life styles – a television set in almost every home, a car in every other home, the emergence for the first time in British history of an affluent and much lauded youth culture and the broad acceptance of policies for the elderly based on the equation Keep Active – Stay Young. (Abrams 1980 p5).

Whether the affluence was ever sustained into old age, whether it continues today, and whether the Welfare State continues to bloom are not for us to judge. What is noticeable is the absence of any reference to education as a distinguishing feature of this younger, more privileged generation. The increase in personal wealth and the development of collective social provision had not apparently been accompanied by higher levels of learning opportunity. This report deals with a still younger age-group – younger both historically and chronologically – and, if conventional indices of prosperity are accepted, a still more privileged one. But have things changed for this next 'generation', and how might they change for future ones?

1.2 THE 'STOCK' POSITION: SNAPSHOTS OF EDUCATIONAL GENERATIONS

This section summarises where we are now as a result of educational policies since the First World War. The key points are:

a) **The great majority of older people had little initial schooling.** Roughly two in three people over 50 and under the state pension age (60/65) left school at 15 or earlier, compared with one in four of those under 50 (Table 1.1).

b) **This initial disadvantage has not been corrected by subsequent education.** Table 1.2 shows the levels of qualification reached by respondents in the 1987 British Social Attitudes survey. These may have been gained in initial education or later on through continuing education. The figures confirm the age differences in educational attainment, most obviously for those with no formal qualifications: the proportion declines steadily, from 73% of those aged 70+, to 46% of those aged 50-54 and 42% of the population as a whole.

c) **The two great social divides of sex and class have had a major and sustained impact on the distribution of educational opportunity.**
   - i) **Sex:** Although women's initial schooling was not much shorter, their level of qualification is significantly lower. Only 2% of women over 50 have a degree and 67% have no qualifications at all. The respective figures for men are 7% and 53%.
   - ii) **Class:** Nearly 9 out of 10 unskilled or semi skilled workers have no qualifications at all. That some relationship between education and occupational level exists is predictable; its sheer strength is striking.

d) **Each succeeding generation is better educated than its predecessor, as measured by length of initial schooling and possession of formal qualifications.**
Table 1.3 and Figure 1.1 show how this pattern has changed over time. The key feature is the steady increase in the level of qualifications. The proportion of those with degrees rises from around 5% for those aged over 50 to over double (11%) for people in their thirties, whilst the proportion of those with no qualifications declines from two in three for those over 60 to fewer than one in five for those aged 20. Within the third age, the pattern is repeated; three out of four men aged 60-64 left school at 15, compared with three out of five of those born ten years later.

Table 1.1

Age Finished Full-time Education (%)

Age Finished F/T Education	All Ages		First Age		Second
	M	F	M	F	M
15 or under	36.0	33.0	7.0	7.2	31.1
16-18	50.0	54.3	83.3	83.4	51.3
19-24	12.6	12.2	9.8	9.4	15.8
25+	1.4	0.5	–	–	1.9

Source: Labour Force Survey 1990

Age	50-4		55-59		60-4		All under 3A		All 50-60/4	
F	M	F	M	F	M	F	M	F	M	F
1.5	62.1	59.5	67.3	66.7	75.0		25.4	25.9	67.9	63.0
3.3	27.4	32.1	24.1	26.3	18.1		58.8	60.2	23.4	29.3
4.5	8.7	8.0	7.1	6.7	5.5		14.3	13.3	7.2	7.4
0.7	1.8	0.4	1.5	0.3	1.4		1.4	0.5	1.5	0.3

Table 1.2

Respondents' Highest Education Qualification (%)

	A. All Ages	B. 50+ 1) Sex M	 F	 *(1)
Degree	8	7	2	(41)
Professional Qualification	13	13	10	(36)
A Level	9	6	4	(6)
O Level	19	10	11	(9)
CSE	8	10	4	(–)
None	42	53	67	(8)

Source: SCPR British Social Attitudes Survey 1987
*Note: 1 = Professional, 2 = Intermediate, 3 = Skilled, 4 =
(N.B. Numbers in Category 1 are too low to have significan

2) Occupational Class				3) Age				
2	3	4	5	50-54	55-9	60-4	65-9	70+
12	1	–	–	5	4	4	4	3
33	8	2	–	16	13	12	10	9
7	6	2	–	5	5	4	7	4
16	12	4	6	18	16	12	5	6
3	12	4	1	8	8	6	8	5
28	61	86	87	46	54	62	64	73

Semi-skilled, 5 = Unskilled
ce)

Table 1.3

Highest Qualification by Age Group (%)

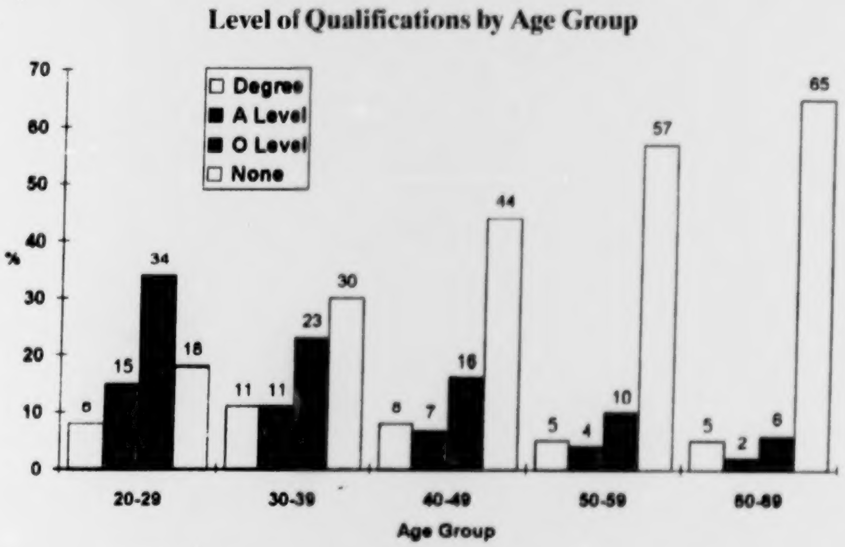
	20
Degree or equivalent	
Higher education below degree level	
GCE 'A' level or equivalent	1
GCE 'O' level or equivalent/CSE Grade 1	2
CSE other grades/commercial qualifications/apprenticeship	1
Foreign or other qualifications	
No qualifications	1

Source: OPCS General Household Survey 1988 HMSO, 19

-29	30-39	40-49	50-59	60-69	Difference Old-young
8	11	8	5	5	−3
9	13	11	9	6	−3
15	11	7	4	2	−13
34	23	16	10	6	−28
15	9	11	11	12	−3
2	3	4	4	3	1
18	30	44	57	65	47

990) Table 7.5

Figure 1.1



Source: OPCS General Household Survey 1988

The figures discussed so far show how low the initial education base is for third agers. This has changed over time, although the UK remains well down the league in the average level of initial schooling. The lowness of the base is accentuated by the levels of participation in the intervening period, ie by current third agers during their second Age. The 1990 NIACE survey shows that 81% of those aged 65 or over and 77% of those aged 55-64 have not studied since completing their full-time education. This compares with a figure for the total population of 63% – itself hardly something for national self-congratulation, when set alongside countries such as Sweden, where every year some 1.5 million out of 6 million adults attend study circle courses. In short, most third agers have therefore gone a very long time without participating in formal learning; and the distance is to be measured not only in calendar years, but also in terms of the distance they perceive to exist between their current position and their experience of education.

Taken overall, the position is improving, but the basic choice is this. Either we can simply rely on time to carry on the process of raising average educational levels, as decade by decade younger people become adult and earlier generations die off. Or we can, as of now, include all generations in the progression towards a learning society. The case for following the second path is in part a moral one, of intergenerational equity and solidarity. But it is far more than that. A focus on the third age provides just the perspective needed for rethinking the purpose of education and its distribution. Instead of being predominantly a full-time formal preliminary to paid employment, it could become a strand of activity naturally interwoven with all the other components of daily life. For third agers learning may very well be related to work, paid or unpaid. But linking education to the third age makes us think about other purposes which are more to do with personal fulfilment or cultural participation. Once that step has been taken, the association can be extended backwards, so that for other generations a similar broader, more generous interpretation of education can be applied.

In short, debating a policy of education for the third age is a perfect means to raising issues about education for society as a whole. If the needs of third agers are to be met, then the needs of Second and First Agers will have to be met differently from how they are now.

All does not fall smoothly into place. There will inevitably be competing claims on resources, and conflict over priorities. If the claims of third agers are recognised, there must in one sense be less for others. The case for increased provision is a very strong one, for reasons of justice (between generations and between sexes) but also for good hard-headed reasons, as we argue later. Yet it is not a zero-sum game. Existing and future generations would benefit from a policy for lifelong learning which took as its point of departure the needs of third agers. It can be a springboard for an educational strategy that provides learning opportunities for all of the population at any point in their lives.

1.3 CURRENT PARTICIPATION IN EDUCATION AND TRAINING

1.3.1 SUMMARY

Section 1.2 has outlined the position of third agers in respect of initial education and the achievement of formal qualifications. This section:

- sketches out a rough map indicating the range of provision of education and training;
- gives an account of participation in these different forms, including how participation is distributed across sectors of education;
- looks at differences in the participation rates of social groups.

The results can be summarised as follow:

a) Our rough estimate is that **about three quarters of a million third agers enrol annually in some kind of formal education, and a similar figure receive some kind of organised training**. Surrounding this core is a great range of informal learning.

b) Over the last decade **there has been an overall increase in access by older people to education and training**, but this has been **patchy** and from a **low initial base.**

c) **Access for older people is particularly inadequate and unequal in relation to training opportunities.**

d) **Initial educational inequalities are confirmed and usually compounded by the pattern of current access.** Inequalities **between** age groups are maintained, but are more significant **within** age groups, notably by social class.

e) **Older women appear to participate more than older men. However this must be seen in the context of lifetime inequalities in education and in the labour market,** which mean that women arrive in the third age significantly disadvantaged, educationally as well as materially.

f) **There is a considerable diversity of educational provision for older people, but how adequate this provision is is a matter for judgement.** Much of it is to be found at local level, where there is considerable concern over finance and over the implications of recent legislation.

g) **Higher Education, apart from extramural provision and the Open University, has paid little attention to the needs of older people.**

h) The sense of **latent demand is very apparent**, but is overshadowed by the absence of material support and the prevalence of ageist attitudes.

1.3.2 A FRAMEWORK FOR MEASUREMENT

It is impossible to give a definitive judgement on the adequacy of provision, but there are a number of ways in which the issue can be addressed.

a) **International comparison** is potentially a useful way of gauging how the UK stands. There is however, no uniform approach to gathering information, though the advent of 1993 as the year of the elderly and intergenerational solidarity provides an opportunity for this (c.f. the establishment of the European Observatory on older people). An overview from the UNESCO Institute of Education draws on a variety of sources from different years and shows estimates of participation rates ranging from 2.3%(1975) to 15% (1990) amongst the 65+ age group in the US, 2% and 6% for those just over and under 65 respectively in Finland (1979/80), 3.7% and 10% for similar age groups in Canada (1984) and 5-10% for those aged 50+ in Netherlands (1990) (Belanger 1992). No country appears outstanding in its educational provision specifically for older people, although the United States can claim to have pioneered interesting initiatives (see Part 3) and to have witnessed the strongest anti-discrimination statements. There are certain areas in which the UK can claim to be reasonably advanced, for example with the Open University and community education. Against this must be set the great overall deficit in the initial and continuing education and training of the population as a whole, now documented in numerous analyses. The contrast is sharpest with countries such as Scandinavia, where participation in adult education is so much more firmly part of the culture, with participation rates of 23% and 16% recorded for the 60-64 and 65-74 age groups respectively in 1982/3 (Rubenson 1989).

b) **Progress over time.** One of the key features of the debate on third age policies is its long-term character. The UK has already passed through one phase of population ageing, and has several years to build up full momentum before entering the next. There are areas, as we argue, where rapid action is needed; but at another level longer-term objectives need to be set, and mechanisms for monitoring progress towards these objectives to be installed.

c) **Rising expectations.** Whatever judgement is reached on the current position, we cannot as a nation pronounce ourselves satisfied. Targets will continually recede. This is in part a **prediction**, on the basis of confident projections of increasing demand, but also a **prescription**: it is a sign of a civilised country that policy is geared to raising as well as meeting aspirations. However difficult it is to define 'needs', there is a ratchet effect which should be anticipated and welcomed: aspirations generate 'needs' which, when met, prompt fresh aspirations.

d) **Social distribution.** Gross numbers give some guide to performance. The distribution of opportunity and achievement is a different matter. How far do certain groups appear to be systematically underrepresented? What has been done to correct this, or at least to ensure that realistic opportunities have been available to these groups even if they have not taken them up? These are questions which should be present in an overall review.

e) **Quality** is as important as quantity. We have set out to establish benchmarks relating to the numbers participating in education and training, and to indicate the amount of other learning taking place. Performance cannot be measured only by headcounts or budgets. The final dimension, therefore, has two aspects: the quality of learning as experienced by the learner (in essence, the quality of consumption) and the effectiveness of the learning. In other words, measurement of progress has to cover not only the numbers learning and the distribution of learning opportunities, but also what the outcomes are. This applies equally to education and training, though obviously in very different ways.

1.3.3 A MAP OF LEARNING OPPORTUNITIES

We think it will serve no useful purpose at this stage to offer tight verbal definitions of education and training. One of the **major** advantages of the Inquiry's remit is to have set the target of bringing together different kinds of learning opportunities. "Education", "training" and "information" refer to by different types of learning; the contexts in which these types are delivered or experienced are traditional classified in terms of **"formal"**, **"non-formal"** or **"informal"**, although these categories are not used uniformly or consistently in public discourses. In describing provision we do not assign different types to rigid categories, but suggest a flexible scale of learning opportunities. This ranges from the most formal – organisations instituted and financed for the express purpose of supplying education and training – to the least formal – where, for example, we train ourselves to mend something using a library book. In any case there is a great deal of overlap.

We focus primarily on **organised** provision. However informal, private or individual forms of learning are crucially important. For many older people who are unfamiliar with more organised educational activities, they provide personal enrichment and enablement, but omit valued social contact with, and support from, other learners.

Figure 1.2 maps the main types of provision currently available for third agers in the UK, and broadly distinguishes between education, training and information (horizontal axis), and between formal/non-formal provision (vertical axis). It is not a definitive picture of all relevant provision and does not convey the overlap existing between different types of provision, - where, for example, a particular kind of provider contentrates on education but may also offer information and training

1.3.4 EDUCATION

1.3.4.1 Introduction

We begin with evidence covering **general** participation in education. The bulk of this refers to local authority provision, located in the centre of our map: further and adult education colleges, community education centres and other bodies. We deal first with specific providers at the more informal end of the spectrum and then with those at the formal end.

It is widely accepted that participation by older adults in education is low. The figure of 2% of adults over 60 as participants, drawn from the 1982 Advisory Council on Adult and Continuing Education (ACACE) survey, is often quoted as a benchmark (ACACE 1982). Percy compared three data sets: the 1970 National Institute of Adult Education survey; the series of General Household Surveys running from 1977 to 1983; and the 1982 ACACE survey. He concludes

> these surveys just about enable us to ascribe to a generalised statement such as this: "we know that for those of pensionable age (and thereabouts) current (i.e. at the time of asking) participation in classes (i.e. all classes; work-related education may make little difference to the figures) is in the range of 2-7%. About two-thirds of this age group have never participated in classes. The remaining (25%-30%) have done so in the past, but are not at present doing so. (Percy 1990 p.31)

More recent evidence is provided by the 1990 NIACE survey, which covered over 4000 people aged 17+. Table 1.5 gives the key results. It shows that 24% of those aged 45-54, 14% of those aged 55-64 and 9% of those aged 65+ either were studying at the time of the survey or had studied within the last 3 years. A further 11%, 9% and 6% respectively had engaged in some kind of informal learning.

Unpublished data from the same source show that the figures for those **currently** studying (i.e. excluding those who had studied recently but were not doing so at the time of the survey) were 9%, 5% and 6%. It suggests that there has been an increase over the last decade or so in the proportions participating in organised study activities.

Figure 1.2

TYPES OF PROVISION USED BY THIRD AGERS
Organisations emphasising provision of:

	EDUCATION	TRAINING	INFORMATION (& SUPPORT)
FORMAL	universities, polytechnics, (mainstream & cont. educ.), colleges of education	TECs/LECs	LA careers services, Employment Dept, TAPS, Jobcentres
		public/private employers	Citizens' Advice Bureaux, advice/welfare rights offices
			MPs, local councillors
	Open University	industrial training boards	Dept of Social Security, LA social services/work depts
	National Extension College, Open College, Open College of Arts		LA housing depts, housing assocs, housing advice centres
	further education colleges	private training organisations	Dept of Health, local health authorities/boards, community health councils, health education authorities
	LA adult colleges, community colleges/schools, adult education centres, community centres	trade unions	LA leisure/recreation depts: libraries, museums, galleries, leisure centres. Sports Council
			Racial Equality Councils
			consumer associations, LA trading standards depts
			police/ legal advice centres
	Workers' Educational Assoc		media: publishers, programme-makers, advertisers
			private companies: employment agencies, careers advice, financial services, manufacturers of domestic technology
	Pre-retirement Association, retirement councils		social service councils, community councils, tenants associations
			Age Concern, Help the Age
	University of 3rd Age		general voluntary organisations, women's associations
			vol. organisations for 3rd age/retired people to inform & campaign, elderly forums
	organisations promoting learning activities among older adults		general groups based on shared role or interests: unemployed clubs, religious groups, hobby clubs
NOT FORMAL			friends, relatives, neighbours, local providers of goods/services

If these percentages are applied to the population as a whole, (and with the figures for the first age group adjusted to take account of the likely lower participation rate of those aged 50-54 compared with 45-49) we get the following approximate results:

Table 1.4

Third Age Participation in Studying

Age Group	Pop size (m)	% Studying	Nos Studying (000s)
50-54	3.1	8	248
55-9	2.9	5	145
60-64	2.9	5	145
65-9	2.8	6	168
70-4	2.3	6	138

These overall figures are to be borne in mind when we look at participation in particular forms of provision, remembering also that there will be people who take part in more than one type of education.

Table 1.5 confirms the well-known fact that **social classes** have very different participation rates. Members of social classes A and B are over twice as likely to participate as those from social classes D and E. This correlates closely with the pattern according to the age at which people finished their initial education: those who had finished at 18 or later were three times as likely to return to study as those who had left school before the age of 16.

This pattern is confirmed by the Scottish survey carried out in 1987 (Munn and Macdonald 1988), which reported higher overall levels of participation (confirming again the impact of higher initial education levels). 73% of those in social classes A and B had participated in some form of education and training since finishing full-time initial education, compared with 26% of those in classes D and E. 40% of those aged 55+ had participated, compared with 52% of those aged 35-44.

Older **women** participate more strongly than older men. In the NIACE study, 28% of women aged 45-54 were studying at the time or had studied within the last 3 years compared with 19% of men from the same age group; the figures for those aged 55-64 were 16% and 11% respectively. Later on the gender difference disappears, with a 10% participation rate for both sexes aged 65-74.

Table 1.5

Proportion Engaged in Formal Study and Informal Learning (%)

	All Studying now/ recently*	No current/recent* study but learning informally now	All studying now/ recently* and/or learning informally
All respondents	26	10	36
Sex			
Men	27	11	38
Women	25	9	34
Age			
17-19	45	8	53
20-24	38	15	53
25-34	35	10	45
35-44	32	9	41
45-54	24	11	35
55-64	14	9	23
65 and over	9	6	15
Social class			
AB	38	12	50
C1	30	12	43
C2	28	9	37
DE	16	8	23
Terminal age of education			
Under 16	13	7	21
16/17	33	10	43
18 and over	45	11	57
Still at school, etc.	–	41	41

NB Percentages are horizontal
*Recently = in the past three years
Source: NIACE 1990 survey (Sargant 1991)

An earlier survey, from 1981, supports this picture. It showed that across all age groups women outnumber men in 'non-qualifying' enrolments (i.e. those that do not lead to a qualification) in LEA classes by a factor of nearly 4 to 1 and in extramural classes by 2 to 1 (Woodley et al 1987, Table 3.2). Given a) that older people tend to enrol more as non-qualifying than as qualifying students, b) that LEA classes are the main form of provision, and c) that the age distribution of non-qualifying students is similar for both sexes, it is clear that a higher proportion of older women than men take part in adult education. The NIACE survey shows on top of this that of those not currently studying more women than men would like to be learning something (39% compared to 30% for those aged 55-64, 33% compared to 27% for those aged 65-74).

Generalisations about **race** are difficult because of the number and variety of ethnic minority groups in the UK (McGivney 1990). In addition, even a large survey can fail to include enough members of ethnic minorities to make sound conclusions possible. Thus the NIACE study acknowledged that its sample sizes were small on this dimension, reaching the surprising conclusion that "participation among ethnic groups . . . is higher than for the white population" (Sargant 1991 p.13), with a total of 45% having studied within the last three years. This may be partly due to the sample including a higher proportion of younger people. McGivney's survey of the literature on non-participation led her to identify ethnic minorities as a prominent non-participant group. Age is a particularly strong factor in these groups, and our own group discussions confirm that there are many barriers facing them (see Part 3).

1.3.4.2 Local/Community Provision

The biggest provider of organised learning opportunities is local government. We estimate that community education enrols over one third of a million older people annually – over half of the total enrolments, involving perhaps a third of the number of hours spent studying (see addendum). This figure of one third of a million third age enrolments is derived from the HMI statistics which showed that about 1.6 million adults of all ages enrolled annually in local adult education classes (HMI 1991). The survey by Woodley and colleagues revealed that 19% of the participants in local classes are aged over 60 (Woodley et al 1987, Table 3.1). We assume that the proportion of those over 50 is around 25%, giving a total of **400,000**.

Local government provision is not confined to local education authorities. In particular, social services and health authorities sponsor or organise a great range of mainly informal learning opportunities. For the most part, the further one gets down the informal end of the spectrum the harder it is to collect meaningful national figures. (See also section C Informal Learning below) **Learning Later**, a report on a study carried out by the Unit for the Development of Adult Continuing Education (UDACE), and published in 1987, contains the following list which demonstrates both the range of organised and more informal activities and the difficulty of quantifying participation. It is from initiatives of these kinds that much of the experience of working with older adults is derived; and much of the work involves collaboration across sectors, or by agencies which often do not fit easily into a particular category or sector.

Learning Later Locally: Examples

- Discussion group meeting in the sports centre which used reminiscence about health cures and health care as a way of thinking about their current patterns of living, eating, exercise, and using the health service.
- A home visiting scheme based at an adult education institute which used volunteers from established adult education classes to take educational opportunities to housebound older people.
- A local history group whose knowledge of their own area has led them to become an environmental campaigning group to protect an area of particular interest.
- A group of older people meeting with representatives from statutory and voluntary agencies in a church hall to discuss the design and delivery of services to older people in the neighbourhood.
- A small team of local artists, musicians and actors doing a tour of old people's homes developing the theme of music, dance, writing and painting in the 1930s through self-expression and reminiscence.
- A group at a day centre who were exploring poems about love through readings, and through writing their own poems.
- A group which is learning about child development and discussing members' own experience of being grandparents.
- A support group of people of all ages meeting to talk about their reactions to loss and bereavement.
- A group meeting in a library to follow a series of television programmes about the history of Wales and to discuss their reactions to them.
- A group of black pensioners meeting in a social services day centre to think about health issues. The course was run by a health education officer and an interpreter.
- An Open Access course at a college of adult education providing an opportunity for older learners wanting to move into higher education.
- A Pensioners' Health Rights course organised jointly by adult education and a pensioners' group looking at what services are available and how to use them.
- An Older Womens' Project organised by Pensioners' Link in London, which it aims to raise the collective voice of older women.' The Project offers resources, information and support for local older womens' groups, enabling them to take action around the issues that affect older women.
- A reminiscence group which had already produced a booklet on their memories of the area, and which is now going into schools to link in with lessons on recent history.
- A 'Streetwise Pensioners' group which helps people to find out about rights and benefits and campaigns on local issues of concern, such as bus services.

Source: Learning Later (UDACE 1987)

In the context of community provision specific mention should be made of **Scotland**. Scotland's Community Education Service combines services to youth and adults, with around 1,000 full-time workers based in centres and schools. It is an 'all age' service with added scope for intergenerational initiatives, and operates on a single continuum running from informal community development to formal adult education. Community Education in Scotland provides a distinctively integrated approach, although within that the specific provision for adult education is often less well resourced.

1.3.4.3 Further Education

Further Education colleges are amongst the major providers of adult education, as well as of training for people of all ages. The colleges have traditionally varied in the emphasis they place on different forms of provision.

The picture is further complicated by recent legislation in this area. The 1992 Further and Higher Education Act places colleges in England and Wales under a national Further Education Funding Council, and in Scotland directly under the Scottish Office for Education (with the option also of a separate Council). The implications of this are being actively debated, but there is little doubt that colleges will be likely to pay more attention to provision geared to industry and less to programmes which cater for community or personal needs. So the position we describe here is unlikely to remain constant over the next few years, independently of whether active measures are taken on the behalf of the third age.

There is a further major caveat to be entered. Data on student enrolments is gathered on a variety of bases across different colleges. For the majority of enrolments, especially on courses unrelated to qualifications, data on age is not usually recorded. It is on these courses that older people, especially those who have left employment are likely to enrol. So the figures we present almost certainly understate the participation by third agers in further education.

Table 1.6 shows that in England in 1989, 126,899 people (44,721 men and 82,178 women) aged 50-74 enrolled in FE courses where age data are available. These courses include ones geared to the organisation of qualifications such as A levels, City and Guilds or HNCs. Other enrolments where no age is reliably recorded totalled over 114,507; if the same age proportions apply this gives about a further 13,200 third age enrolments, making a grand total of some **140,100** third agers out of a total FE enrolment of 1.21 million – **11.5%** of the total. This compares with 1988 figures of 110,513 identified third age enrolments; adding on 8,300 as the appropriate proportion of enrolments whose age is uncertain gives a total of 118,815 – 10.4% of the total. Figures for 1984, although not strictly comparable because the system of classification has changed slightly in the intervening period, show an identified third age enrolment of 78,307; an estimated additional 9,920 gives a total of 88,227 – 9.6% of the total.

Directly comparable figures are not available for other parts of the U.K. But in Scotland in 1989, 5732 people aged 50+ participated in advanced and non-advanced part-time courses put on by local authority colleges. To this figure can be added roughly another

2,200 as a proportion of the 'ages unknown', making some 8000 third age enrolments in total (Munn and Macdonald 1988).

It is worth noting the differential rates of increase involved. Adult and FE enrolments in England increased overall by 6.3% between 1988 and 1989; but whilst the 19-49 age group went up by only 2.1%, the 50+ group increased by **14.8%**. This is a substantial jump. It reinforces the importance of local colleges as providers of educational opportunities for a wide range of adults. There has been no particular initiative to prompt it, though it may be due in part to increased joblessness; it underlines the extent of latent demand.

Table 1.6 also shows a significant **gender difference** in enrolment patterns (see Figure 1.3). At all ages, women outnumber men, in total the proportion of men to women being about 1:2 for 1989. For third agers, the difference is slightly more pronounced. It shifts significantly further in favour of women in the 60-64 age group, presumably as women retire and use their extra free-time for study, decreases in the next age group (65-9) and then increases sharply after 70, due in part to the change in the relative size of male and female populations, which is particularly marked after the age of 70. (It may be worth noting that whereas in 1984 and 1988 there was one man aged 70-4 enrolling in FE for every two women, in 1989 this had dropped to 1 in 3. Whether or not this is a blip the overall imbalance is very clear.)

1.3.4.4 Workers' Educational Association

The WEA is a long-established provider of liberal adult education throughout the UK. Its ethos emphasises the democratic participation of students both within classes and in the running of the Association itself. WEA districts offer daytime, evening and weekend courses, often including programmes specifically for older people, who also tend to predominate in non-dedicated courses. Fees vary from one area to another, but concessions are usually available for older adults on low incomes; the WEA is one of the few providers offering free classes for certain groups in some areas. It is also known for taking education into places (such as rural areas) not served by other providers. Enrolments for 1989-90 totalled 180,955. No age breakdown is available, but it is likely that older adults form at least a third of these giving a minimum of some **60,000**.

1.3.4.5 Pre-retirement Education

PRE is offered by employers, educational bodies such as the WEA, private organisations and retirement councils. The umbrella organisation for these is the Pre-Retirement Association (PRA), working with the Centre for Health and Retirement Education. The last major survey carried out was by Coleman, published in 1983. This covered around 3,000 organisations, and found that some 2000 PRE courses were run in 1981, with about 35,000 participants. The PRA currently estimates from annual surveys of providers that about 1400 courses are offered per year potentially attended by 26,000 people. This is a conservative estimate since it excludes some private, in-house company courses. However, the PRA believes there has been an overall decline in numbers participating in pre-retirement education since the early 80s, leading us to use a figure of

Table 1.6

Adult Enrolments in Further Education (England) 198

	19-49	50-54	55-9
1989			
Men	387,028	16,227	8,346
Women	585,878	29,346	13,829
TOTAL M&F	972,906	45,573	22,175
1988			
Men	377,999	14,140	7,687
Women	574,865	24,663	12,004
TOTAL M&F	952,864	38,803	19,691
1984			
Men	325,139	10,539	7,447
Women	409,024	14,510	12,846
TOTAL M&F	734,163	25,049	20,293

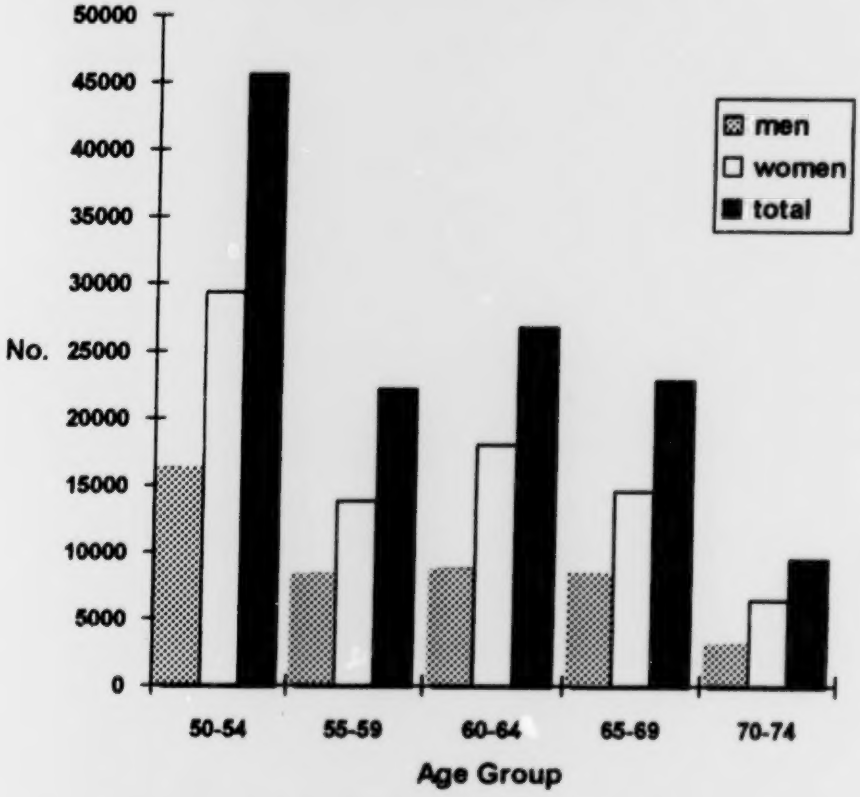
Source: Department of Education and Science

9, 1988, 1984

60-4	65-9	70-4	Unknown	Total 50-74	TOTAL
8,753	8,285	3,110	41,888	44,721	473,637
18,038	14,560	6,450	22,619	82,178	740,675
26,791	22,845	9,515	114,507	126,899	1,214,312
7,752	7,150	2,911	33,596	39,724	451,235
15,124	12,319	5,909	46,234	70,789	691,118
22,876	19,469	8,820	79,830	110,513	1,142,353
5,834	3,838	2,178	39,903	29,836	394,878
10,280	6,616	4,219	63,434	48,471	520,929
16,114	10,454	6,397	103,337	78,307	915,807

Figure 1.3

Third Age FE College Adult Enrolments (England) 1989



Source: Department of Education and Science

30,000 participants. This is in the context of a cohort of 590,000 people aged 5 years below state retirement age.

1.3.4.6 University of the Third Age and Other Informal Providers

There are a number of informal organisations whose main remit is to promote learning among older people. The largest of these is the U3A, which has around 150 affiliated groups and upwards of **20,000** members throughout the UK. Each group consists of third agers not in full-time employment who organise their own educational activities, drawing on the expertise of members and meeting in local institutions or in one anothers' homes. Many members are retired professionals, especially teachers/lecturers. Some groups actively attempt to attract more working-class and ethnic elders, while preserving the sense of social solidarity underpinning each U3A. A few groups hold meetings in the homes of the housebound, or in residential homes, to encourage the involvement of residents. There is no form of assessment, and the relatively small cost of membership includes an affiliation fee to the national co-ordinating body – the U3A Trust.

Apart from the U3A, other examples of informal educational organisations include for example the Dark Horse Venture (predominantly in England and Wales), and the Discovery Award in Scotland, both of which encourage older adults to develop new interests and activities, including outdoor pursuits, and acknowledge achievements by presenting awards. Though relatively new, both schemes are growing rapidly.

1.3.4.7 Distance Learning

In addition to the Open University (see below) there are many institutions, public and private, offering distance learning courses. One of the largest of these is the National Extension College, with a total of some 17-18,000 students. Of these, some 4,000 are aged 50+. Women outnumber men by 2:1 in the NEC's overall enrolments, but proportionately more of the men are to be found in the older age groups. The Open College of the Arts is a more recently established institution with some 5,000 students, of which 38% – **1,900** – are over 50.

We return now to the formal education sector, having already described the part of it which is quantitatively most significant for third agers, as far as published statistics allow us to tell. We can divide the rest as follows:

1.3.4.8 Open University

Table 1.7 gives OU enrolments for 1989, covering both undergraduate enrolments and those of associate students who do not register for a degree but for a module or course only. The OU is by far the biggest provider of higher education for third agers, with almost **10,000** undergraduates aged 50 and over enrolled. (In addition to the provision it makes for third agers, the Open University has enabled the formation of an active Older Students Research Group, which has produced a number of useful reports on the experience of older students inside and outside the University – for example OSRG 1987)

1.3.4.9 Polytechnics and Universities

Enrolments for degree and diploma courses in polytechnics and universities are given in Tables 1.8 and 1.9. The proportion of older people is tiny, especially in universities. One of the main reasons for this is the dominance of the full-time mode of provision, again in the universities above all, and we shall return to this later.

However, a very considerable number of older people enrol in liberal adult education provided by the universities. There are no national figures available by age and indeed few extramural departments (now usually termed departments or centres of continuing education) keep age data, but an estimate can be made. Total enrolments in university liberal adult education were 271,055 in 1988/89 (UCACE 1990). At a conservative

Table 1.7

Open University Enrolments (1989)

Age (at 1:1:89)				Undergraduates
		New		
	M	F	Total	M
Under 25	1,063	862	1,925	1,822
25-49	6,886	6,212	13,098	31,483
50-4	274	349	623	1,750
55-9	214	220	434	1,179
60-4	167	162	329	939
65+	105	96	201	923
TOTAL 50+	760	827	1,587	4,791

Source: Open University Statistics 1989

Total		Associates			Total		
F	Total	M	F	Total	M	F	Total
1,485	3,307	400	368	768	2,222	1,853	4,075
26,446	57,929	3,899	5,011	8,910	35,382	31,457	66,839
2,039	3,789	186	248	434	1,936	2,287	4,223
1,348	2,527	136	118	254	1,315	1,466	2,781
857	1,796	88	74	162	1,027	931	1,958
742	1,665	113	61	174	1,036	803	1,839
4,986	9,777	523	501	1,024	5,314	5,487	10,801

estimate third agers represent 25% of enrolments, giving a figure for them of around **68,000**. Some of these will be multiple enrolments by the same person, but it is nonetheless a significant figure.

1.3.4.10 Education/Training in Basic Skills

This is offered by a variety of providers, including LEAs, the OU, voluntary organisations and some employers. But the low initial education level of many third agers means that the need for basic skills training is high among this age group. A survey of Adult Basic Education (ABE) services in Scotland in 1989-90 revealed that of the 9% of the Scottish adult population reporting difficulties with basic skills, only 0.6% were receiving tuition. The two main providers – LEA ABE Units and FE colleges – were failing to attract the over 65s, especially FE colleges. The proportion of ABE students aged 46-64 was very low compared to younger adults. The Adult Literacy and Basic Skills Unit (ALBSU) is currently conducting a similar survey in England and Wales, asking for an age breakdown of students.

1.3.4.11 Concluding Remarks

In the Addendum to Part 1 we have pulled together all these different figures into an overall estimate of participation in education by older adults. The gross figure arrived at is some **755,000 enrolments annually**. We have also made some crude calculations of what this represents in terms of hours spent studying. This figure accords reasonably well with the estimates derived from the NIACE survey produced in Table 1.4. We have relegated the figures to an addendum because they are estimates of a different, rougher, kind than the statistics cited in this section. But this overall estimate may act as a point of departure for future more comprehensive surveys.

There is no absolute standard for judging levels of participation in education. We have seen that older age groups participate less than younger ones. But it is also the case that other social variables, notably class and ethnicity, are stronger influences than age alone. This has important implications for the future. Gender has a different effect from its normal one, with female participation being generally stronger; this, however, must be seen in the context of a cumulative disadvantage experienced by women earlier on in the life-cycle.

Part 3 of this report considers some of the reasons for these patterns. For the moment, Percy (1990) provides a judicious reminder that judgements on participation rates should be considered in a number of different contexts:

a) low participation by **all** adult age groups in the UK;

b) the **heterogeneity** of older adults; there are numerous sub-groups, divided by sex, race, class and, within the general category of older adult, by age;

c) social participation by older adults who are significantly involved in **voluntary organisations** and learn through this activity (see section 1.3.6. below).

Table 1.8

Non-university Higher Education Enrolments (England,

				1980		
		M			F	
	PG	1st degree	Other	PG	1st degree	Othe
Under 50	14,648	71,671	134,669	7,249	59,501	52,58
50-4	192	261	677	79	285	63
55-9	54	97	240	24	92	16
60-4	9	38	61	3	25	4
65-9	14	37	47	3	18	2
70-4	2	6	13	2	5	
75+*	2	12	40	2	8	2

				1989		
		M			F	
	PG	1st Degree	Other	PG	1st Degree	Othe
Under 50	20,926	110,767	139,987	15,292	112,859	95,43
50-4	372	365	1,002	295	590	1,33
55-9	131	172	446	87	256	40
60-64	47	94	161	23	100	11
65-9	26	61	93	18	50	6
70-4	10	27	38	2	16	2
75+*	2	23	44	7	17	3

, 1980, 86, 89)

		1986						
		M			F			
r	Total	PG	1st degree	Other	PG	1st degree	Other	Total
2	340,320	17,360	93,730	141,722	10,550	90,072	83,198	436,632
2	2,126	226	296	1,086	140	404	1,193	3,345
9	676	92	154	473	38	180	377	1,314
2	178	38	92	158	16	78	113	495
7	146	9	39	52	10	30	38	178
7	35	21	77	89	8	36	49	280
5	89	6	11	49	0	6	25	97

r	TOTAL
8	495,269
5	3,959
8	1,500
2	537
3	311
5	118
5	128

*Includes unrecorded ages

Source: Department of Education and Science

Table 1.9

Universities (UK): Full-time and Sandwich Enrolments

	Under
A Undergraduate	
First Degree	248,9
Other	8,9
TOTAL	257,8

[N.B. Growth of 'other' may be helping 50+ enrolments]

B Postgraduate	
Masters	19,5
PhD	13,6
Other	14,8
TOTAL	48,0

Source: Universities Statistical Record

1980		1986		1989	
r 50	50+	Under 50	50+	Under 50	50+
924	292	242,253	421	265,486	607
922	37	17,364	53	24,060	132
846	329	259,617	474	289,546	739
564	181	24,737	246	27,292	226
527	46	14,537	66	16,925	77
862	138	16,347	210	15,992	138
053	365	55,621	522	60,209	441

Participation by older adults in education, in short, takes many diverse forms. Over time it has generally increased. A blanket deploring of the inadequacy of provision is therefore not in order. Part 4 of this report sets out basic objectives for policies, expressed in terms of personal enrichment, individual enablement and the ability to exploit opportunities. These may at some point be translated into more specific quantitative and qualitative targets which reflect the aspirations of a mature and wealthy democracy. However ambitious or unambitious these are, it is for the moment reasonably clear that:

a) there are major gaps in the provision as it stands;
b) there are major social differences in access to it;
c) large parts of the formal sector show little awareness of the existence of older adults as potential students.

It is unlikely that education for older adults will collapse completely. It is a very real possibility that while it will grow healthily, and informally, for some segments of the population it will disappear for others.

1.3.5 TRAINING

1.3.5.1 National Participation Rates

The 1987 British Social Attitudes survey reported that 26% of respondents aged 55-64 had been on a course or other formal work-related training in the last two years, and 30% of those aged 45-54, compared with an all-age figure of 40%. However the Training in Britain survey of 1989 (Training Agency 1989) gives much lower figures of 14% of those aged 55-59 and 23% of those aged 45-54 having received vocational training over the last three years (Table 1.10). Since some people will have participated in each of the two or three years covered by the surveys, and given also that participation has increased for all age groups in recent years (see below), we can assume that the annual figure for third agers is somewhere between 7% and 15%. This means that **roughly nine out of ten older people receive no training in any given year**.

Table 1.11 and Figure 1.4 present data from four different years on job training received in the last four weeks. It shows:

a) Training for all groups has gone up in successive years, from an all-age figure of 9.1% in 1984 to 15.3% in 1990.
b) The proportions of older people receiving training have gone up faster than the others (for example 60-64 year old men doubling from 2% to 4%); but they remain very low relative to younger age groups.
c) There is virtually no difference between the sexes in overall terms within the older age groups. A slightly higher proportion of older women than older men have received training.

Table 1.12 and Figure 1.5, also from the LFS but using slightly different bases, give details of how training is distributed according to educational qualification and occupational level. As well as confirming that third agers receive significantly less training overall than younger workers, it shows:

a) Within the third age, access to training is highly differentiated according to education level and, relatedly, occupational group. 3% of older women with no qualifications received training, compared with 28% of those with degrees, a **ninefold** difference; for men the figures are 3% and 15%.

b) Educational/occupational level is more significant than age when it comes to securing access to training. Although third agers at all levels receive less than younger people with similar qualifications, educated third agers (O level or above) receive more than second agers with no qualifications.

Table 1.10

Employer and Other-funded Vocational Education and Training by Age (%)

	In last 3 years		Funding	
	No	Any	Employer	Other
Age				
19	27	73	28	47
20-21	43	57	34	30
22-24	52	48	31	21
19-24	45	55	32	32
25-34	63	37	30	8
35-44	70	30	25	6
45-54	77	23	18	4
55-59	86	14	11	1
TOTAL	67	33	25	9

Source: Training Agency, 1989

Table 1.11

Received Job Training in Last 4 Weeks (% of all depen

	1984 Total	 M	 F	 Total	198 M
All Ages	9.1	9.6	8.4	10.7	11.4
First Age	16.0	18.5	13.2	18.2	20.7
Second Age	8.6	9.1	7.9	10.1	10.9
Pre-ret	3.1	3.0	3.4	4.0	3.8
Post-ret	2.2	–	2.2	2.5	–
50-4	4.1	4.2	4.0	5.2	5.1
55-9	2.4	2.2	2.7	3.2	3.4
60-4	2.0	2.0	–	2.3	2.3
All under 3A	10.6	11.6	9.5	12.4	13.5

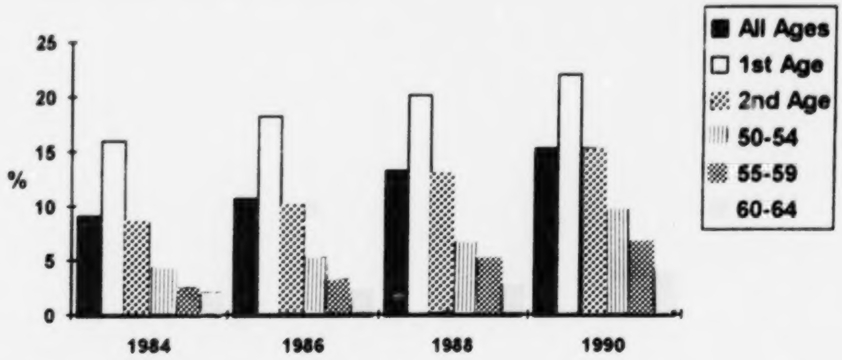
Source: Labour Force Survey 1990

dent employees)

6	F	Total	1988 M	F	Total	1990 M	F
4	9.9	13.2	13.3	13.0	15.3	15.2	15.5
7	15.5	20.1	22.0	18.1	22.0	23.7	20.2
9	9.2	13.0	13.2	12.8	15.3	15.0	15.6
3	4.2	5.5	5.0	6.3	7.7	7.3	8.3
	2.5	1.5	–	1.5	–	–	–
	5.3	6.6	6.2	7.0	9.6	9.4	9.8
4	3.0	5.2	5.0	5.4	6.6	6.8	6.4
3	–	2.7	2.7	–	4.0	4.0	–
5	11.0	14.9	15.5	14.3	17.0	17.1	16.8

Figure 1.4

Training received in last 4 weeks



Source: Labour Force Survey 1990

Table 1.12

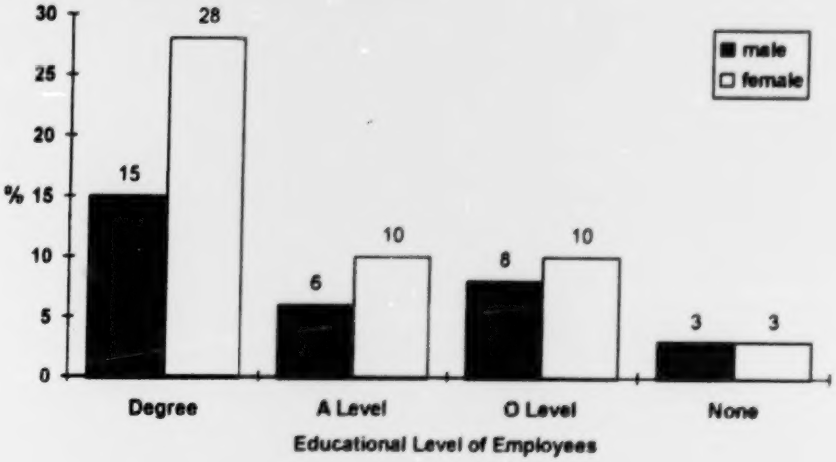
Received Job Training in last 4 weeks (%)

	First Age (Under 25)		Second Age (25-49)		Third Age (50-59/64)	
a) (Employed only)	M	F	M	F	M	F
Degree equivalent	36	38	25	32	15	28
A level	28	26	12	17	6	10
O level	28	21	13	14	8	10
No quals	11	8	5	5	3	3
b) (All respondents)	25	22	13	15	7	8
i) Manual	21	17	7	6	3	2
Non-manual	31	25	20	19	10	12
ii) Leads to qualification?	70	68	33	35	10	19
iii) Length: 6 months +	71	67	28	20	9	31

Source: Labour Force Survey 1990

Figure 1.5

Participation in Training
(men aged 50-64, women 50-59)



Source: Labour Force Survey 1990

c) Generally, women at the same educational level appear to have more access to training than men. An older woman with a degree has a better chance of receiving training even than a younger (second age) man with the same level of qualification.

d) Training leads to a qualification for more in younger age groups. Of these receiving training, one in three second agers was heading for a qualification, compared with one in ten older men and one in five older women.

e) Older women appear to be significantly more likely than older men to be receiving prolonged training of six or more months.

It may appear from this analysis that third age women are relatively advantaged in their access to training. However, this must be set against the fact that female economic activity rates are lower, and that the **proportion** of older women who are highly qualified (the most favoured group) is far smaller than that of older men (see Table 1.2). The higher percentage of older women gaining qualifications may reflect their concentration in certain occupational categories (clerical and secretarial – see Payne 1991, p48). The apparent advantage at this stage, whilst socially significant, must be set against the overall cumulative disadvantage suffered by women.

Employment Training is the medium through which the bulk of publicly financed training takes place. From 1988-89 Department of Employment statistics show that third agers consistently formed only 5% of those entering ET. As is confirmed in the examination of the TECs, their underrepresentation is ensured by the discriminatory specification of the priority group: the Guarantee group – 18-24 year olds who have been unemployed for at least 6 months – and the Aim group – 25-50 years old who have been unemployed for at least two years. It is not necessarily the case that there should be exact parity of participation between age groups. But since long-term unemployment disproportionately affects older people and one major criterion for ET is its capacity to remedy the social and economic problems associated with unemployment, the virtual exclusion of older people is a very serious matter. A DE sponsored survey on the training requirements of older workers concluded:

> Most recruitment practices and training programmes are designed for younger people and take no account of the potential of older people. Thus they reinforce the fears, lack of confidence and sense of inadequacy that are embedded in much of society's orientation towards youth. ET is seldom modified for older people, and suffers generally from shortage or unreality of work placements. (Downs and Clarke 1991, p2)

One area in which older workers may be overrepresented is Restart courses. In January 1991 attendance on these was made mandatory for people who had been out of work for over two years who refuse to take advantage of the offer of a place on a training or employment scheme. Given that older people tend to be unemployed for longer than the average, and in certain contexts to take a pessimistic view of the local labour market, they probably form a significant proportion of those who attend Restart courses – 87,385 in total for Great Britain in January-June 1991 (**Working Brief**, December 1991).

As for **outcomes** from ET, Table 1.13 gives details comparing the experience of those aged over 50 with all ages. Older adults were rather less likely to find full-time employment, and more likely to be in self-employment or voluntary work. But the most significant conclusion is that older adults are twice as likely to finish ET by returning to unemployment but without claiming benefit. This is a depressing outcome.

Existing outcome measures are, however, only a very partial indicator of the **quality** of training. Agreed evidence on this is hard to come by, but there have been some fierce criticisms of it and it is certainly a matter for debate whether the quality of much ET provision is adequate. Payne (1991 p.45) concludes that the level of skills aimed at by ET is generally lower than that of the preceding Training Opportunities Scheme.

1.3.5.2 TECs/LECs

Public responsibility for training now lies mainly with Training and Enterprise Councils or TECs (in Scotland Local Enterprise Companies). These have only recently been established, in 1990/91, and it has proved too early to give a settled picture of their performance. The prospects for TECs and LECs have recently been reviewed by CBI and TUC representatives and others (PSI 1992). They identify a number of areas of potential and potential concern. The key issue is that of resources, and here there is a broad consensus that government funding is inadequate, and this inadequacy has been accentuated by recent funding decisions. This is more apparent in some regions – for example London – than others (Hanson 1992). Initial surveys of work in this area do not provide an encouraging picture as far as third agers are concerned, though there are significant exceptions to this. The results reported here are drawn from our own quick survey of TECs; more in-depth research into small number of TECs and LECs, together with interviews with selected employers; and research already carried out by the Department of Employment (Downs and Clark) covering 8 TECs and a number of training providers.

Table 1.13

Employment Training Outcomes (%)

	51+ (N=9278)	25-50 (N=72,724)	All Ages (N=119,765)
Full-time job: work experience	6	8	8
Full-time job: other employers	12	14	15
Self employment/EAS	8	6	5
Part-time job	8	8	7
Voluntary work	5	3	3
Other government training programme	0	1	1
Full-time education/training	1	2	2
Unemployed: claiming benefit	39	44	45
Unemployed: not claiming benefit	11	6	5
Job Club	5	5	5
Something else	4	4	4

Source: Department of Employment Statistics (Quarterly Follow-up Report for Jan-Dec 1990)

The positions of TECs can be classified into 4 categories:

a) Those for whom it was too early to make any comment (the information comes from research carried out in the first half of 1991).

b) Those for whom there was explicitly no commitment to older workers, either as a deliberate choice or as an overt recognition of the constraints imposed by contracts which are shaped by the definitions of Guarantee and Aim groups. This is accepted by some TECs more openly than others.

c) Those who have set out a commitment to older workers, but this is subsumed under a general policy on Equal Opportunities or, more rarely, Special Needs.

d) Those who have taken specific initiatives in respect of older workers. These include:
  - the gathering or commissioning of special studies, eg on the attitudes of employers; on the training needs of older workers; on the provision of work-related further education by local FE colleges;
  - awareness campaigns, aimed at employers or at third agers directly;
  - 'careers guidance' for older workers, and skills assessment services for employers;
  - special training provision, eg tailored courses; self-development workshops; the creation of appropriate learning environments.

The Employment Department has now produced a Good Practice guide on Training for Older Workers (see section 3.3.)

A Case Study

Below is a summary of a brief case study conducted in the Glasgow and Lanarkshire LEC areas. The study comprised interviews with a small number of employers and education and training providers in each area; and, in Lanarkshire, with trade unionists. It also included documentary material from the Enterprise Companies and a small amount of evidence from postal questionnaires.

a) The overall impression and evidence from the survey is that older workers are currently an ignored and undervalued resource for most employers, and that most employers regard themselves as having little, if any, responsibility for assisting their employees to make a successful transition from employment to retirement. The expectation is that employees of 50+ should retire rather than retrain. No employer had a policy or strategy for addressing the specific education, training or pre-retirement needs of the over 50s.

b) On the positive side, some employers are open to focussing on the skills and experiences which older people have, and may well be amenable to looking at imaginative suggestions for utilising the resources held by older workers whilst still in employment, and in retirement. A number of employers who participated in the study stated that it had raised their awareness of issues to do with older workers and had provoked their interest.

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Discrimination:

c) Although most employers would insist that there is no direct discrimination against older workers in terms of age, most employers' training programmes are focused on younger people. Employers admit that older people tend to be reluctant to participate in training because of a lack of confidence, or because of a perception of themselves as being too old, and yet most employers do not intervene to encourage older people to participate in training.

Values

d) A number of employers in the study said they valued the skills experience and expertise of older people, but few had developed a method or strategy for capitalising on the abilities of older people. Examples of employers who have used the skills and expertise of older workers to train younger workers include British Steel and British Rail Maintenance Limited.

e) Where older workers have participated in training, both the workers and the employers have valued the benefits in terms of productivity and increased morale that this has brought to the company. Most employers who had provided training for older workers considered that older workers could, for the most part, adapt adequately to change.

Educational Opportunities

f) Educational opportunities for older people, which are offered principally through the Regional Education Department, generally reflect the traditional community education curriculum of offering mostly leisure provision. There are exceptions of developing good practice where courses or provision are targeted specifically on older people. The developments initiated in Lanarkshire by the Community Education Service, in response to the redundancies in the steel industry, are of interest because the CES has created a special focus on the situation of the older worker and have researched the educational needs of these workers.

g) The introduction of Accreditation of Prior Learning on an extended scale should be of advantage to older workers in helping them assess and possible certificate, their prior learning, skills, and experiences and thus increasing their self-confidence and self-esteem. It is unlikely however, given the low self-confidence of many older workers, that the over 50s will come forward for APL without positive encouragement.

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Pre-Retirement Provision

h) There was a surprising and significant lack of pre-retirement provision in any meaningful form. Even major employers with good training opportunities for staff in general put a very low priority on pre-retirement courses or counselling.

Stress

i) Most of those interviewed spoke of the increasing stress on all workers, but in particular on older workers, because of change in the labour market environment. Particular factors affecting change in the Glasgow and Lanark areas involve the fact that there is currently a major shift taking place from public sector employment to private sector employment, and that there are consequential dramatic changes in the terms and conditions associated with public sector employment. [This study was carried out before the shock news of the imminent closure of Ravenscraig].

j) Although at one time it was possible for staff to be offered relatively generous redundance or early retirement packages this situation has now changed, and even where staff might wish to take redundancy or early retirement on health grounds, in many instances they cannot afford to do so. The stresses on older workers in the most vulnerable areas ie those working in low paid, low skill, insecure jobs without opportunities for education, training and without pre-retirement provision, are undoubtedly going to increase.

1.3.5.3 Other Forms of Work-Related Education and Training

Not all learning that takes place at or through work is work-related. Paid Educational Leave (PEL) is a term which has gone out of fashion since the 1970s, when national surveys were carried out on PEL in England and Wales (Killeen and Bird 1981) and Scotland (Bryant and Titmus 1982). But one long-established form of PEL remains – trade union education – and other forms of work-based educational support have emerged: initiatives such as Ford's Employee Development Assistance Programme or Rover's Learning Business scheme, in addition to particular programmes in the public sector (eg Wolfe, 1987).

a) **Trade Union Education** The TUC reported a total of 29,873 students attending its approved courses in 1990/91: 14,344 on 10-day courses for union workplace and safety representatives, and 15,529 on shorter courses (TUC 1991). No age breakdown is available, but older representatives form only a small proportion of this, probably under 5% (1,400 - 1,500). Individual trade unions suitably provide education for their representatives and members, from basic trade unionism to environmental (and other issues), perhaps doubling the total.

b) The Ford **Employee Development and Assistance Programme (EDAP)** was jointly negotiated in 1988. It is funded by Ford setting aside a sum per employee per annum (originally £40, now higher) into a fund from which any employee can claim up to £200 per annum to meet the fees of any course he or she might choose. The scope of choice is virtually unlimited, covering vocational training, more academic subjects and issues of personal lifestyle. It is oriented to the students' needs, is jointly managed and makes no claim on public funding. EDAP does not provide paid educational leave in the strict sense, in that employees pursue the courses in their own time. The scheme has been running for some four years. During 1990/91, a total of 20,931 applications were approved; with many individuals taking more than one course, this represents a participation rate of 31.3% of all Ford of Britain employees (TURU 1992). No age breakdown is yet available for the scheme as a whole, but at the Trafford House site 47% of the 900 employees are over 45, and about 45% of these have taken advantage of the scheme. Classes take place on and off site, and cover a wide range of subjects, with languages and health predominant.

Similar initiatives in other companies are appearing. Another example is the **Rover Employees Assisted Learning** (REAL) scheme which assists employees to pursue non job-related education and training, helping with advice, contribution to costs up to £100 and providing access to Rover's Open Learning Centres, Between May 1990 and August 1991 over 2,500 employees were sponsored under REAL. Initially scepticism was reported especially amongst older employees, but this has apparently disappeared (Metcalf 1992).

1.3.5.4 Voluntary Organisations

The term "voluntary organisations" encompasses a very wide array of groups, with some catering for the needs and interests of members, and others using volunteer members to serve the needs of people in the community at large. Surveys differ as to the extent to which the over-fifties are involved in voluntary organisations. **Learning and Leisure** indicates that "voluntary service" constitutes a main leisure time activity for 9% (630,000) of 45-54 year olds, 13% (754,000) of 55-64 year olds and 12% (1,092,000) of those 65 and over. The 1987 General Household Survey gives much higher figures for those participating in some form of "voluntary work" in the previous year: 25% of those 45-59; 22% of those 60-69; 13% of those 70 or over (compared to a total for the population over 16 of 23%). A recent survey (Volunteer Centre UK 1991) suggests that in 1991 as many as 30% of those aged 65 or over were currently "volunteers" (compared with almost 60% of 35-44 year olds). According to our own small survey of voluntary organisations in Scotland, the over-fifties constitute a major source of volunteers. Some organisations specifically target older people, whose experience is seen as valuable in the organisations' work – particularly that done with families and the disabled.

While few voluntary organisations have a specific recruitment policy for volunteers, almost all volunteer-using organisations offer induction training relating to the organisation's policies and practice, and to the tasks involved. In-service training is more patchy, and depends on the organisation's resources. No national figures are available on the exact numbers of older adults receiving training within voluntary organisations, but the Volunteer Centre UK believes that the majority of volunteers receive no training other than initial induction. (None of our Scottish respondents had a policy on the recruitment or training of older volunteers, and only half reported providing any training). Where in-service training is offered, this tends to fall into three broad categories: support skills for volunteers (stress/boundary management, advocacy, etc); interpersonal skills (counselling, communication, etc); practical skills for those doing environmental/conservation work. The Centre finds that those working on environmental projects, in advice and counselling, and in fundraising tend to receive most training, with much less offered to those providing social/community care, or working in the arts and heritage areas.

For younger adults in particular, voluntary work (for example in an environmental organisation or social services/work department) may well help to secure employment or full-time training in these areas. Some careers guidance staff recommend voluntary work as an interim measure for unemployed third agers during the current recession, even though the link from unpaid to paid work is less clear-cut for older people. However, organisations report that volunteering provides psychological benefits for the volunteer, such as increased confidence and self-esteem, and volunteer training produces improved quality of service to clients. For those moving from paid work into voluntary activities – organisations such as RSVP (Retired and Senior Volunteer Programme) and REACH (Retired Executives Action Clearing House) testify to the benefits for both individual third agers themselves and the communities to which they contribute. The development of workplace volunteering among older employees (as encouraged by Business in the Community) is seen as one way of easing the transition into retirement.

The Volunteer Centre suggests that the government is keen to promote occupational standards in training for volunteer managers and volunteers themselves, particularly in the light of moves towards the establishment of contracts between social service/work departments and voluntary organisations under community care arrangements. Qualifications for voluntary sector workers inside the London School of Economic's MSc for the Voluntary Sector and the RSA's Diploma in the Organisation of Community Groups. An NVQ scheme for volunteers is also being developed, and NIACE (in **Valuing Volunteers**) argues for the importance of offering accreditation for volunteers' training and experience. One organisation particularly interested in the RSA Diploma is the Women's Institute, which has its own college in Oxfordshire. Other examples of voluntary organisations involving older volunteers which are able to provide substantial amounts of training include the WRVS, the Samaritans and NACAB.

1.3.5.5 Concluding Remarks

There has been some increase in the provision of training for those older adults who remain employed. Nevertheless the overall picture on the training side is not a bright one. Whilst a few employers – notably in the retail sector, the most publicised of which has been B & Q – have converted general rhetoric about older workers as a resource into positive action through deliberate recruitment, investment in skills development appears to be very low.

A recent Employment Institute report (Mayhew 1991) pointed yet again to the UK's low overall investment in training. It also pointed to the difficulties, in the current economic climate, for employers in taking time to review their training decisions. Given that **attitudes** are of crucial importance, this is a major barrier.

We stress this point not only because of its intrinsic importance, but because of the **link between third age training and education**. If older employees – **especially those with fewest skills** – are not enabled to learn in their last years at work, they will move into life after work with low or zero aspirations for learning. This will crucially influence their personal development and their propensity to participate socially, for example in volunteer activities.

1.3.6 INFORMAL LEARNING

1.3.6.1 The Extent of Informal Learning

We have already referred to organisations specifically set up to provide education on an informal basis. What about organisations or situations where the learning is more incidental? The extent of informal learning in the older population is often hidden even from those who are doing it. Classification could involve a combination of the following dimensions:

Individual – Collective
Private – Public
Organised – Non-organised
Active/production – Passive/consumption

For example, the individual who does occasional knitting at home is learning in a different way from the members of a needlecraft group who meet each week to share their skills, and demonstrate their progress on a particular piece of work. Often, the **same** situation can be handled quite differently; each member of a family watching TV together might be doing it separately, without communicating, and therefore passively – or they may operate as a collective, actively discussing what they are seeing.

The extent of informal learning is considerable. In the early 1980s, Robert Smith pointed to 30 research studies in different countries which he claimed demonstrated that "for most adults more learning transpires through self-directed efforts than through agency sponsorship. In fact the typical adult spends about 500 hours annually in five independent learning projects" (Smith 1982 p.31). More recently, NIACE's 1990 survey (see Table 1.5) found that 11% (or 770,000) of 45-54 year olds in the UK reported activities which the survey classifies as "informal learning only" (respondents were not studying formally – currently or in the last three years). This was true of 9% (522,000) of 55-64 year olds and 6% (546,000) of those aged 65 and over. Over half (53%) of the students in our Norfolk/Wandsworth survey were engaged in organised but informal learning as well as participating in classes. In the NIACE sample population as a whole, the most popular subject of informal learning was how to use a computer, followed by foreign languages, handicrafts, playing musical instruments and cookery. The survey suggests that informal learning is most prevalent among the middle- and upper-classes, and least common among the unskilled working-class. The highest proportion of informal learners are to be found in the South West and South East of England and in East Anglia, with the lowest proportion in Scotland.

1.3.6.2 Learning in Voluntary Organisations

The discussion of voluntary organisations in section 1.3.5.4. gives details of the extent of third agers involvement. Percy's 1988 survey uncovered much evidence of formal learning within such organisations (talks, training, assessment, etc), but also of substantial informal learning. Another investigation of the kinds of learning taking place in different voluntary organisations (Elsdon 1991) suggests that the following sorts of learning tend to be taking place in organisations across the spectrum:

a) **Social and personal learning** – voluntary organisations provide a network in which people are mutually supported, fostering the development of confidence and new undertakings. Specifically, they provide opportunities for developing listening and debating skills, tolerance, self-awareness and assertiveness, and skills involved in preparing and presenting information. Such networks are an effective source of important information, not only for members themselves, but for others.

b) **Occupational learning** – they provide support (in regard to confidence, and intellectual and social aspects) for those in the course of re-training or re-entering the job market.

c) **Political learning** – deriving from the autonomy and absence of hierachy found in many groups. They offer "training" in personal responsibility and participation, organising skills and the development of "civic courage".

Volunteering can also entail the acquisition of management, financial and planning skills. Elsdon points out that the new skills and knowledge gained are often passed on to members' families, and members themselves are better able to take responsibility at work and in other contexts.

1.3.6.3 Concluding Remarks

At least 1.5 million – and probably many more – third agers are engaged in informal learning (systematically finding out about something). This is roughly equal to the numbers engaged in organised education and training put together (see Addendum to Part 1). But informal learning is not necessarily an activity which takes place in one's leisure time. The attention given to the need for formal training and education in the workplace tends to overshadow the huge amount of informal learning going on there, as workers share their experiences and expertise.

It is likely that informal learning is more common among women (through their involvement in voluntary work), among those living in towns and cities (where clubs, libraries, museums, etc are more prevalent), and among members of the white majority. The barriers which discourage minority ethnic elders from participating in more formal learning tend to discourage them from joining in other organised activities where the learning is incidental. Among older members of ethnic minorities women are more constrained in regard to activities outside the house than men, but both sexes must learn a great deal about their "new"environment (often from younger relatives) if they are to operate successfully in it.

A broad definition of informal learning would include the use of new **information** which helps people lead more effective daily lives, or the bits of knowledge they acquire from TV programmes and other media. We consider this in Part 2.

1.4. FUTURE DEMAND: THE COHORT EFFECT

Identifying and projecting trends is always hazardous, particularly in relation to an area as complex as demand for education and training. The issue is further complicated by the difficulty of coping with both **latent** and **articulated** demand. Nevertheless we feel confident in predicting a **very substantial increase in demand**, for the following reasons:

a) It is one of the truisms of adult education that at all ages people with more initial education participate more in continuing education. This generates its own momentum, so that those who have already benefited from some continuing education return more frequently. We may call this the **inbuilt momentum**.

   We have already seen, from Table 1.3, that the level of educational attainment measured in terms of formal qualifications, is steadily increasing. The juxtaposition of Tables 1.14 and 1.15 makes the point. Even if younger age groups do nothing more to enhance their qualifications between now and the time they enter the third age, they will arrive there with significantly higher levels of education than the current generations of third agers (Table 1.14). And the multiplier effect of initial educational level on subsequent educational participation is shown by Table 1.15. The implications for future demand are clear – or at least the direction is clear even if the scale of the increase is unpredictable.

b) The **social climate** refers to the general attitudes prevailing towards education. Scandinavian countries have a social climate which is particularly favourable towards continuing education, and this explains their exceptionally high participation rates, notably in study circles covering the country and an impressive range of subjects – part, of course, of a virtuous circle whereby such politically educated attitudes promote public and private expenditure which yields a wide range of attractive opportunities. Although hard to quantify, it is almost certain that attitudes to learning are changing in Britain.

   Part of the general rationale for the breadth of our remit in this study is the interrelationship between education and training. As Lord Beloff remarked in a recent House of Lords debate on adult education, "education is what teaches you the value of training", and the reverse is probably equally true. The economic framework which we refer to elsewhere – with a declining future for unskilled workers (IER 1991) – will provide the stick to complement the carrot of the pleasure of learning. As and when the economy recovers, the bottlenecks caused

Table 1.14

Education Attainment of the Population by Age and Se

Level of education	All males		Males	
		20-24 years	25-34 years	35-44 years
Total	15,135	2,310	3,882	3,578
Level A	48.2	51.4	41.9	43.2
Level B	6.5	14.1	7.4	5.5
Level C	28.8	24.4	31.6	30.5
Level E	16.6	10.1	19.1	20.8

Level A:	Completed less than upper secondary ed
Level B:	Completed upper secondary education
Level C:	Vocational, non-academic education/tra
Level E:	Completed at least one higher education

Source: Organisation for Economic Cooperation and Develo

ex, 1988 (OECD)

(% except Total in thousands)

		Females					
45-54 years	55 years and over	All females	20-24 years	25-34 years	35-44 years	45-54 years	55 Years and over
2,772	2,593	13,656	2,234	3,841	3,463	2,746	1,372
49.9	59.3	72.1	66.6	67.1	71.7	78.5	82.9
3.8	2.6	6.3	12.4	7.7	5.1	3.0	2.6
29.6	25.2	6.8	9.9	7.1	6.7	5.1	4.4
16.5	12.8	14.8	11.1	18.1	16.5	13.4	9.8

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Table 1.15

Terminal Age of Initial Education and Participation in Study and Learning (%)

	Total	Studying/ learning now/in past 3 years	Studying/ learning now/in past 3 years and would like to learn	Not studying 'part-time' now, but learning now and would like to learn	Not studying now/ recently nor learning now and:		
					All	Would like to learn	Would not like learn
Base – all respondents = 100%							
Terminal age of education							
Under 16	41	24	23	28	51	46	55
16/17	36	42	42	38	32	34	30
18 and over	18	29	31	27	13	14	11
No information	2	2	1	1	2	2	2
Still at school, in full-time study	3	3	3	7	2	4	2

Source: NIACE 1990 Survey (Sargant 1991)

by skill shortages will generate further demand for more highly trained workers. Social acceptability will go hand in hand with economic necessity to increase demand for learning at all ages.

In the NIACE survey a further 34% of those aged 55-64, and 27% of those over 65 said they would like to take part. In other words, **between 2 and 4 times as many in each age group expressed some willingness to learn**, however nebulous, **as were actually participating**. When combined with the steadily increasing educational levels of each succeeding generation, this presents a formidable wave of potential demand.

c) A further factor can be added: the declaration of **official aspirations** for increasing learning opportunities. The government and the opposition parties have already declared their intention of expanding the numbers in higher education by 50% by the year 2000. The RSA report **More Means Different**

(Ball 1990) set targets for participation and achievement for young people and for adults: by the end of the century 60% enrolment by 18-21 year olds, and 100% enrolment by adults in some form of education and training for at least a fortnight every year. The CBI has set similar targets for the workforce: by 1996 all employees should take part in training or developmental activities as the norm with half of them aiming for qualifications within the National Vocational Qualifications/Scottish Vocational Qualifications framework; and by 2000 50% of the workforce should be qualified to a minimum of NVQ/SVQ level 3 or its academic equivalent.

If older workers are not excluded from this we shall see not only the expansion of vocational education that this implies, but a knock-on effect on demand for learning after they finish paid employment. At present there is a crucial dislocation: older workers are not given access to training at work, and because they are working, almost always full-time if they are men, they have obvious constraints on their access to other forms of active learning. As a consequence, they enter the third age with time but no learning habit. We are tempted to say that it does not matter much what they learn in the later stages of their second age as long as they are learning something, and carry this habit with them into the third age. (This mirrors the belief which motivates the Ford Motor Company to introduce its EDAP scheme, namely that a workforce that is learning **outside** the job will show itself alert to learning on the job.)

d) Cross-sectional evidence on the **dissolving of stereotypes** comes from the BSA survey. Table 1.16 gives responses to a question on whether 'training work is really only for younger people or those starting new jobs". It shows that 38% of those aged 70+ and 31% of those aged 65-9 agreed or strongly agreed, compared with 15% of those aged 50-54 and 14% of those aged 55-59. There is obvious self-interest at work here, since the younger age groups still have a chance of benefiting from a rejection of the proposition, but the difference is too great to be explained by that alone. Changing occupational structure is also relevant, since 39% of the unskilled and 28% of the semiskilled (strongly) agreed that only younger people should be offered training, compared with 13% of the intermediate class.

e) **Family attitudes** play a part. Increased parental education – at all levels – influences staying on rates at school and participation in higher education (Burnhill 1990). Parental attitudes are unlikely to count for much for third agers, but essentially the same process is likely to influence older people.

   i) Whilst in younger age groups **spouses'** attitudes are not always positive, the main negative factor – neglect of domestic responsibilities – which sometimes causes friction between partners will be less in evidence for third agers without dependent children. Indeed, the reverse certainly occurs, for example with women (especially) urging newly retired spouses to get out from under their feet. More positively, third age partners can encourage each other to participate, singly or together, by example or in other ways;

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Table 1.16

"Training is really only for younger people or those en

	All Ages 50+	Occupat	
		*(1)	2
Agree Strongly	3	–	1
Agree	15	(12)	12
Neither	13	(2)	13
Disagree	57	(68)	65
Disagree Strongly	11	(16)	6

Source: SCPR British Social Attitudes Survey 1987
**Note:* 1 = Professional, 2 = Intermediate, 3 = Skilled, 4 =
(N.B. Numbers in Catergory 1 are too low to have significa

tering new jobs" (%)

ional Class			Age				
3	4	5	50-4	55-9	60-4	65-9	70
4	2	6	1	2	3	5	2
23	26	33	14	12	20	26	36
16	15	25	12	16	15	14	20
51	43	30	64	59	53	48	33
4	7	4	8	9	5	2	2

Semi-skilled, 5 = Unskilled
nce)

ii) we may see an influence from **filial** education levels – in other words a reverse effect to that described above, with parents being drawn into education by their children's higher participation. There is abundant anecdotal evidence of parents deciding to re-enter education after their children have completed their initial education.

In short, the important questions are not about whether older people can learn but about the size of the increased demand and – crucially – whether we can act quickly enough and competently enough to meet it.

ADDENDUM: NOTE ON OVERALL VOLUMES OF ORGANISED EDUCATION AND TRAINING

We have drawn together a number of statistics on enrolments by third agers in a range of education and training. The account does not purport to be comprehensive: statistics are simply lacking in some areas, and we have certainly not been able to bring together even all those that do exist. This note is an attempt to consolidate what we have gathered, and to explain how this has been done. Its crudeness will be very apparent; it is offered as a basis for further, more refined work.

EDUCATION

We present here two kinds of overall volume figures. First we draw together the **enrolments** to give a picture of the relative significance of the different sectors. Secondly, we attempt to give some kind of **weighting** to the different enrolments in terms of hours spent studying.

a) Table 1.17(a) recapitulates the enrolment figures given in the report, with the following amendments:

   i) **FE** enrolments have been increased to include an estimate of those in Scotland, Wales and Northern Ireland. Rounded total FE enrolments of those aged 19+ were, in 1988: England 1.1 million; Scotland 140,000; Wales 55,000; Northern Ireland 37,000. Applying the same ratio for third agers (10.4%) to the non-English as obtained for the English would give a total of 24,000. The Scottish ratio is almost certainly smaller, since community education provision is more often located outside FE (a small number of colleges contacted all had third agers as 6-7% of total enrolments); but this may be assumed to be roughly offset by the growth noted since 1988. Hence the overall estimate of 150,000.

   ii) **Non-university** HE. The figures quoted in the report are for England only and we have increased them by 15% to take in the rest of the UK, to 7,000.

b) **Hours** Table 1.17(b) is a particularly crude attempt to weight enrolments by hours. In several cases there is a huge variance in the lengths of courses within the same institution, and an alteration in the 'tariff' can have major effects. But it provides at least a basis for comparison.

TRAINING

In the report, we cite the divergence between the 1987 BSA survey and the 1989 Training Agency survey on overall participation rates, and also present LFS data. The problem in comparing all these figures is that they cover different timescales: the last three years, two years and four weeks respectively. In trying to derive an annual participation rate we have adopted the following steps:

Table 1.17

Third Age Enrolments in Education (estimate for 1989/90)

	(a) Enrolments (000)	% of total	Average Hours per enrolment	(b) Total hours (000)	% of Total
Adult Education (local authority)	400	54	30	12,000	36
Further Education	150	20	30	4,500	14
Workers' Education Association	60	8	20	1,200	4
Pre-Retirement Education	30	4	10	300	1
University of the Third Age	20	3	100	2,000	6
National Extension College	4	1	150	600	2
Open College of the Arts	2		150	300	1
Open University (ug)	10	1	400	4,000	12
(Assoc)	1		200	200	1
Higher Education: non-univ	7	1	800	5,600	17
univ degree	1.2		800	960	3
univ extra-mural	70	8	20	1,400	4
	755	100		33,060	101

a) Overall numbers of those economically active in the age groups 50-54, 55-59 and 60-64 have been calculated using male and female activity rates from GHS or 88% and 60%; 83% and 50%; and 53% and 20%. This gives total figures as follows:

50-54	2.3 m
55-59	1.9 m
60-64	1.0 m

b) Table 1.18 applies participation rates for training given by the TA survey and the LFS.

Table 1.18

Third Age Participation in Training

	Economically active	TA (last 3 years) '89		b) LFS (last 4 weeks)	
	Pop (m)	%	Nos (000)	%	Nos (000)
50-4	2.3	*18	414	9.6	221
55-9	1.9	14	266	6.6	125
60-4	1.0	*10	100	4.0	40
	5.2		780		386

*18% is the midway point between 23% – the figure for 45-54 year olds – and 14%; 10% is a simple extrapolation downwards for the last age group.

c) If 780,000 third Agers received training in the last 3 years and 386,000 in the last 4 weeks, how many received it in the last year?
   - i) We can assume that some of the 780,000 received training in more than one of the years concerned; rather than divide by 3, we have therefore divided by 2, giving an annual participation rate of **390,000.**
   - ii) LFS data show that 50% of third age trainees received training of less than a week's duration; roughly a quarter received anything from a week to over a year; and another quarter's training was 'ongoing'. It would only be reasonable to multiply the rate for the last 4 weeks by 12 to get the annual rate if **all** training was a week or less. It may be reasonable to multiply it by a factor of 2-3 giving **772-1,158,000 (965,000** mid-point).

   It looks, in short, as if an estimate of **650-700,000** out of 5.2 million as an annual rate might be in order- some **13%.**

TOTAL VOLUMES

In Table 1.4 we provide figures for the total number studying derived from the NIACE results applied to the total population. This gives a total, for all these aged 50-74, of **844,000.** Our two global enrolment figures, for education (755,000) and training (675,000), give an overall figure of between 1.4 and 1.5 million. Since some people enrol more than once, a figure of **1.2-1.3 million** participants is more probable.

2 INFORMATION

2.1 INTRODUCTION: CULTURAL RIGHTS FOR THE THIRD AGE

Part 1 presented a broad outline of the report as a whole, and a map of providers of education, training and information; a statistical picture of participation in organised education and training; and a brief section on informal learning. In Part 2 we report separately on the provision and use of information, which is a far more diffuse area and not amenable in the same way to statistical presentation.

According to one analysis, (Murdock 1992) effective citizenship for third agers – which involves full participation in (and helping to shape) patterns of social life – rests on four subsidiary rights: civil, political, social/economic, and cultural. These are all interlinked, with cultural rights being of central importance, and depending on the fulfilment of three kinds of needs:

a) to have access to the full range of information, argument and interpretation which allows people to make considered personal judgements and political choices, and to effectively pursue their rights in other areas **(Information rights)**;

b) to have the full range of one's experience, beliefs, ideas and aspirations adequately and truthfully represented in the major means of public communication **(Representation rights)**;

c) to contribute to the circulation of information and representation, not simply as a consumer but as an active provider, having the opportunity to speak as well as being spoken about **(Communication rights)**.

This framework raises an enormous range of issues at a number of levels, from the practical to the most abstract. We focus here on the more concrete aspects, and primarily on the first kind of need. In principle the increased leisure time available to most third agers should enable and encourage them to make use of the growing array of information bases which are available; and greater confidence and knowledge should enable them to claim more fully their representation and communication rights. In practice there remains many barriers to the exercise of all three rights.

2.2 SOURCES OF INFORMATION

2.2.1 INTRODUCTION

The map in section 1.3.3. of this report identifies the main sources of services and support for third agers, enabling them to live effective lives. Most of such agencies produce information of some sort (usually leaflets, rather than via TV, radio or newspapers), but unless this is effectively communicated to the public, the information, and indeed the service itself, may as well not exist. Various studies on information use among older adults point to the large degree of inefficiency existing in the information system as a whole – a profusion of information in general, much of which is unavailable at the right place, or time, or in the appropriate form.

Through the 1980s there has been a shift towards placing more information services in the market sector, as public financing of public and voluntary provision has declined. There is some concern among public and voluntary providers that their work in compiling computer programs and databases for free information services will be "overtaken" by private companies seeking profit from information services. Profit may derive either from charging for information itself, or from sales of goods and services resulting from information supplied. Companies selling financial services (especially pensions and investment plans), for example, often offer representatives to contribute to financial advice sessions in pre-retirement courses, or sell complete pre-retirement courses to other employers. The need for independent and comprehensive financial advice is becoming more pressing with the growth of personal pensions, especially for women:

> "The evidence from the material about women's own knowledge of pensions, the way that pensions are marketed and the advice they are likely to be given, is not reassuring. Women's knowledge of SERPS, and of the small print of personal pension provision, is limited. Accessible information and unbiased advice about the different options, and the different products available on the market, is difficult for anyone to obtain. Information and advice that takes into account the disrupted employment and earnings patterns of many women is even more difficult. At the stages in her working life when a woman is most likely to need good financial advice, she will probably earn too little to be able to pay a fee for it, and her market group will offer too little profit for commercial providers to offer it any other way." (Davies and Ward 1992 p.90).

The private sector tends to produce large quantities of "pervasive" information, aimed at the population as a whole. While straightforward general information is necessary, information which evaluates goods and services, which involves an interactive approach, and which relates to specific life-events (widowhood, change in occupation, illness, etc) is more effective in regard to older adults – although it is more difficult to come by (Mullings 1989).

Only small numbers of older people actively seek information, and those over retirement age are less likely than those under it to use advice centres. 60-69 year olds make more use of them than do those between 50 and 59 or over 70, and women actively seek help more than men (Troup 1985). The National Information Forum's small-scale study in one London borough found that among the elderly disabled, almost two-thirds had outstanding needs, relating – in order of importance – to: housing; heating; personal help/company; money. Our own limited survey of older members of different ethnic minority groups in Edinburgh uncovered a demand for information in community languages (as well as more help with English) on: basic rights; financial affairs; immigration; family and medical problems; recreational and other facilities, and opportunities for education/training and employment.

Older adults form a larger than average proportion of rural dwellers, and recent research into the needs of the rural elderly in Cleveland highlights the necessity for clearer

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information and advice services (Cleveland Council for Voluntary Services 1992). A study of mobile information centres in the early 80s found that older adults, have significant advice and information needs in the fields of social security, housing, and health. Inquiries (all ages) in rural areas tended to be concerned most with property and consumer issues, while urban users focused on family and personal matters (Mosely and Packman 1982). A comparison of the nature of inquiries made by the over-60s to two CAB offices – in urban Edinburgh and suburban/rural north east Fife – suggested that personal problems, welfare benefits/tax queries and accommodation matters are more-or-less equally important for those in inner city areas, while benefit inquiries predominate very heavily in the suburban/rural area (Troup op cit).

Most information exchange does not involve written sources, but face-to-face contact and the telephone, and this is especially true for older adults. They tend to rely most on family and friends for their information, although family members are among the least often rated as helpful over money and housing matters, and there is more likelihood of incorrect information coming from relatives, neighbours and friends (Allison 1982). Very often, information on its own (particularly when in broadcast form or leaflets) is insufficient to generate action; personal contact seems to be the key to this – especially where the person giving the information is known and trusted. On the other hand, oral information is easily forgotten.

Figures indicating the relative importance of different "official" sources of information are hard to come by. TV, radio and the press are used by the vast majority of third agers (see below). The CAB and Age Concern appear to be important sources (Greengross 1985). Troup also identifies the following as significant channels: hospital broadcasting; teletext services; microcomputers; magazines (both those aimed at older adults and generalist publications); free newspapers; libraries; post offices; mobile information centres; home help services; health vistors and district nurses.

Our own primary research suggests that the most important sources of "everyday" information for older people are: TV, radio and newspapers (especially local papers); informal networks; libraries; GPs and health centres; community centres; clubs and societies, including the WI; churches; CABx and Citizens' Rights Offices; DSS offices; Age Concern; educational institutions; shops and post offices. The main formal sources used by our sample of minority ethnic elders are the CAB and Citizens' Rights Office; community workers/leaders; religious groups; children's teachers; the media and libraries. More important are informal sources – children, husband, other relatives, friends and neighbours. GPs are the only professionals with which some older people have regular contact, and they are a significant source of information because they are trusted (Bayley 1981). However, while they are an important link for social services contact, they tend to confine their information to matters of health care.

As for information specifically on education/training and employment opportunities, in reply to our survey the vast majority of educational and occupational guidance staff report no specific policies for dealing with older inquirers, the number of whom has increased in recent years. Although they currently form less than 10% of the client group of most services, this figure is expected to rise. However, staff tend to anticipate a continuation of the resource limitations which currently restrict the amount of help they can offer to older clients. In theory, technological advances could improve the services available for third agers providing access to national and local databases such as Training Access Points. However the value of computerised psychometric testing should be weighed against the negative connotations which impersonalised tests may have for older adults. The Department of Employment is currently piloting a guidance project, "Gateway to Learning" which brings together a range of providers within a TEC area to offer a one-stop service, and involves guidance vouchers for the unemployed. A number of "private" employment agencies have also appeared to meet the demand among older people for assistance in finding paid work, and to promote a positive image of older workers.

Few organisations have clear strategies for the diffusion of the information produced, and rely on saturation bombing. The DSS uses blanket coverage – ensuring leaflets are widely available in many different outlets; in 1986-7, it produced over 154 million leaflets altogether, costing almost £5million. However, leaflets found by members of the public may be out of date, and in places where no interpretive advice is available. NACAB focuses on getting up-to-date information to client-advisors, with monthly updates. It seeks to lower search costs for clients by offering a comprehensive one-stop service, and also through an outreach service where its database is available in hospitals, prisons and isolated communities.

2.2.2 BOOKS AND LIBRARIES

Some third agers read in connection with a formal course of study; others as part of an organised "project" of their own. Many, however, simply pick up bits of information, ideas and "know how" from ongoing random reading – of books, journals, magazines, leaflets, etc. Family Expenditure Survey data suggests that, while expenditure on the TV licence and on TV and video rental is more or less constant across different income groups within the third age population as a whole, amongst the retired those who are wealthier spend most on books, magazines and newspapers.

Comparing the various survey findings on the reading of books in particular, this is clearly a major source of information for third agers (Table 2.1). While those aged over 65 (particularly in lower income groups) are considerably less likely to buy a book than other age groups, the GHS for 1987 suggests that those aged 60-69 are the most frequent older users of libraries; although less than a third of this group had visited their local library in the previous four weeks, this was above the average for the 16+ popluation as a whole (26%). The more recent figures on library use from **Learning and Leisure** are even higher.

Edmonds' 1990 survey of library administrators throughout England found increasing recognition of the importance and needs of this client group. **All** local authorities claimed to provide services specifically for older and/or disabled users (over a third had written policies on this), including mobile libraries, and collections taken to residential homes, day centres and hospitals. More than half of the authorites charged a staff member with particular responsibility for this group.

Table 2.1

Use of Book, Libraries and Newspapers among Third Agers (%)

a) READING BOOKS				
General Household Survey 1987 ages:	45-59	60-69	70 +	All adults
% reading books in 4 weeks before interview:	60	62	55	60
Taylor Nelson 1991	45-54	55-65	65 +	
% reading books regularly:	44	51	48	35
Learning and Leisure 1991	45-54	55-64	65 +	
% reading as a main leisure activity:	49	55	60	51
b) USE of LIBRARIES				
General Household Survey 1987	45-59	60-69	70 +	
% visited library in 4 weeks before interview:	23	31	27	26
Learning and Leisure 1991	45-54	55-64	65 +	
% visiting library at least once a month:	30	36	40	23
c) READING NEWSPAPERS				
Social Trends 1991	45-64	65 +		
% reading 1 or more of daily – tabloids:	52	41		50
– mid-market:	21	23		23
– broadsheets:	17	11		16

Table 2.2

Percentage of Retired Households Owning Selected Items of Communications Equipment

	Mainly dependent on state pensions		Other financial circumstances	
	single person	couple	single person	couple
Television set	96.8	99.0	98.0	99.0
Telephone	75.1	86.4	91.0	94.4
VCR	6.1	16.6	10.4	35.7
Home computer	–	0.3	0.6	3.4
Car or van	7.8	38.9	38.4	73.8

Source: Family Expenditure Survey 1989

Table 2.3

Time Spent Viewing Television and Listening to Radio (in hours and minutes per week)

	Television Viewing			Radio Listening		
Age Group	1985	1989	change	1989	1989	change
4-15	19.59	18.27	−1.32	2.24	2.21	−0.03
16-34	21.59	20.34	−1.02	11.42	12.21	+0.65
35-64	28.04	26.07	−1.97	9.43	11.10	+1.67
65 and over	36.35	36.29	−0.06	8.04	9.00	+0.56

Source: Broadcasters' Audience Research Board 1989

Most expenditure on print media goes on **newspapers** rather than books. Almost two-thirds of those in the 65+ age group read at least one daily newspaper – particularly tabloids. The provision of information relevant to third age citizens in both national and local press has increased in recent years due to the expansion of special supplements and sections on areas such as health, holidays, consumer affairs and personal finance. But because newspapers are centrally concerned with expanding their readership by recruiting new readers to replace older ones, they often attempt to appeal to younger adults.

Although older adults prefer TV and radio to newspapers in general, the latter are seen as a better source of information (Real et al 1980). There has been a rapid rise in specialist publications aimed at third agers, including **Choice** magazine (with a circulation of over 90,000 per month), **Yours** (120,000 per month), **50 Plus** (45,000 per month), and **SAGA** (circulation 600,000, of which about half is distributed free). Paradoxically, while the articles in these magazines encourage a very positive approach, the advertisements tend to convey an image of ill-health and dependency. The new magazine **The Oldie** presents a stereotype of older people as ill-tempered and cynical.

2.2.3. BROADCAST MEDIA

Surveys of the use of domestic communication and information facilities (TV, radio, video, telephones, home computers, private transport) do not generally subdivide age by income or other variables, but Table 2.2 gives some indication of the importance of income in structuring the cultural rights of retired households, in particular. Since broadcasting is the only medium that is available more or less universally in retired households, this makes it (particularly TV) a central forum for presenting and exploring the experiences, ideas, aspirations and demands of third agers, and for debating public policies of particular relevance to them. Its function as a source of information and learning is enhanced by the use of VCRs, which release those affluent enough to possess one from time constraints, allowing them to watch items at their own pace.

The BARB figures in Table 2.3 indicate that TV viewing increases substantially with age, and reaches a peak among those 65 and over. Moreover, between 1985 and 89 this age group has reduced the time spent watching TV very little, unlike members of younger age groups. BBC research carried out in 1988 found that programmes aimed at third agers, or which featured a large proportion of older adults, attracted an audience containing a high percentage of older people. Greater numbers, however, watch "mainstream" programmes, and older viewers tend to prefer light entertainment, quizzes, news and current affairs and religious programmes. More recently C4 has discovered that programmes labelled as being for older viewers have not been well received. The fact that most of these specialised programmes have appeared on C4 (with its remit to serve "minority" groups), underlines the marginalisation of issues relevant to third agers.

Recent BBC research shows that older people are under-represented on TV as a whole by a factor of one to three (compared to their prominence in the total population). British commentators point to the negative images of third agers often portrayed, and to their role in the background, rather than as central figures in drama, as presenters or as interviewers, for example. "In detective series elderly people are always victims; in soap operas they . . . are usually crotchety or nuisances . . . In the news they are typically reported as the subjects of crisis" (Johnson 1988, p21). One positive development is the educational project introduced in early 1991 by the University of California L.A.'s School of Medicine to train TV leaders "to reinforce positive portrayals of older adults in the media". The project includes a survey, workshops, a conference, and a directory of gerontologists who will act as consultants, and it involves some of the most powerful figures in the US TV and film industry.

TV informs and educates (in the widest sense) not only through its educational programmes, its documentaries, news, drama and light entertainment, but also through the advertising it carries. Research International set up a "Fiftysomething Unit" to investigate advertising images of older people, and found that this age group saw themselves as virtually invisible in advertisements for a whole range of products they regularly bought. However, recognition of the spending power of the growing number of older people is promoting a re-evaluation of established conventions in the advertising industry, and new images of third agers are beginning to appear.

As for the radio, we see from Table 2.3 that the 65+ population only spend a quarter as much time each week (9 hours) listening to radio as they do watching TV. Older listeners tend to listen to BBC stations, particularly to Radios 4 and 2, and to BBC local stations, rather than to local commercial radio. A 1982 BBC study found that, on the whole, radio tends to be used by the over-55s as a background for other activities, except in the mornings when they listen to derive information.

2.2.4. HEALTH EDUCATION

Information about health is important for this age group because major life change – experienced in several forms during later life – is likely to be accompanied by a change in health (Coleman and Chiva 1991). If health deteriorates, this produces a need for medical and other types of services and information, while at the same time reducing a person's capacity for finding such help.

Health educators have developed models to guide the production and dissemination of information, although large gaps in knowledge remain. Health education is generally evaluated in terms of changes not just in knowledge, but in behaviour. It appears that group discussion techniques and community development approaches are particularly powerful, and often have other educational and social benefits (Tones 1979).

Despite the fact the third agers (especially men) do not tend to see information about health as particularly important, it seems that they enjoy watching TV items on health (Willcocks 1984). Information on health issues is frequently embodied in programmes of health education, which allow individuals to explore themes over time, using their own experience. Hence, the Health Education Authority's current interest in pre-retirement or mid-life planning using the "managing change model", and responses to our small survey of health education professionals which indicate an increase in participative approaches in recent years. Peer health counselling (as advocated by the Centre for Health and Retirement Education and the Beth Johnson Foundation) is a promising approach.

Official health education usually takes the form of long-term campaigns using TV and press coverage, leaflets and information packs, aimed at the population as a whole. These include the HEA's "Look After Yourself" campaign, which also involves local groups (including groups of older adults) run by specially trained tutors, and the Scottish "Fit For Life" campaign organised by the Health Education Board Scotland (HEBS), and other agencies. Other national initiatives include the OU's "Health Choices" course, employed by many local health education groups. Information booklets are produced by the British Medical Association and the Consumers' Association, and also by commercial organisations such as the Milk Marketing Board.

In regard to older people, the HEA's "Health for Old Age" programme became Age Concern's "Age Well" campaign, with groups throughout England. The HEA is currently focusing on health promotion via the workplace, encouraging companies to foster health awareness in employees throughout their lives. HEBS employs a senior officer with responsibility for later life issues and has, for example, produced material for teachers to faciliate intergenerational work on health care.

In recent years there has, in fact, been an increase in training for those working with older adults in many areas – doctors, nurses, social workers. Some argue that this is still not sufficiently widespread; others advocate an end to this kind of specialism, arguing that clients should be approached not as a member of a "problematic" age group, but as individuals with particular needs.

Professionals in this field suggest that the following are important types of health-related information for third agers:

- physical health/ lifestyle information/ the process of disease
- what help is available and where to find it
- how to campaign for better services
- how to cope with authority/assertiveness
- how to deal with stress, relationships, financial matters
- memory training (now widespread in the US and Holland, for example)
- encouragement to view ageing positively
- "independence training" for some; "dependency awareness" for others – to enable them to acknowledge their needs and ask for help.

2.3. CONCLUDING REMARKS

As with education and training, it tends to be those most in need of information who have least access to it, especially the housebound, ethnic minorities and those in rural areas. Similarly, third agers (especially those over retirement age) tend to use advice centres less than younger adults, and older women actively seek information to a greater extent than do older men.

Two issues stand out: the power of the media as means of communication, and the current necessity for individual financial resources to purchase the means of communication (telephone, transport, newspapers and magazines, computers), and sometimes the information/advice itself. At present, the media operate largely as one-way channels and provide general information, although this may change in the future if community service broadcasting is expanded. The diversity of public services (including information services themselves) means that finding the help one needs often requires the mediation of a trained guide, yet many older people rely on relatives and friends for advice, which often involves misinformation.

In Part 1 we pointed to the continuum spanning information use, informal learning, and organised education and training. The relationship between these three is thrown into sharper focus by recalling the set of citizenship ideals with which we began this part of the report: third agers' right to make informed (and educated) choices, to be fairly represented, and to communicate their wishes and ideas effectively. In Part 3 we look in more detail at barriers to access in education and training in particular, before describing examples of good practice (including in the field of information provision).

3 BARRIERS AND GOOD PRACTICE

3.1. INTRODUCTION: LATENT POTENTIAL

This part of the report deals with two sides of the same coin: the barriers which prevent participation by older adults in education and training, and instances of policies or practice which show promise of overcoming these barriers. Without reviewing it in any detail we draw mainly on existing literature, supported and illustrated from our own fieldwork.

One candidate for the greatest barrier to learning is sheer inability to learn. The association of ageing with declining ability is strongly rooted in the public mind (as is apparent in section 3.2 below). At the risk of appearing provocatively simplistic, we present just 3 basic conclusions, following each with a quotation which captures the essence of research in the field.

a) **Some deterioration in some aspects of some people's ability to learn occurs with age.** These are largely to do with tasks which require relatively quick responses or memory tests. The abilities of most people remain stable throughout, and may even increase.

From the US National Institute of Aging's review of a decade's work:

> Research has shown incontrovertibly that the doctrine of "inevitable aging decline" is a fallacy initiated by faulty interpretation of cross sectional data . . . Nevertheless, the fallacious doctrine is still largely accepted by policy makers, professional practitioners, and the public at large. The stereotype of inevitable decline remains stubborn; the very notion of aging seems to connote decrepitude, misery, or dependency upon "medicine" as the only means of preventing either disease or institutionalisation . . . Chronological age is used as the basis for many professional or policy decisions that can have unintended negative consequences, such as: early extrusion from the work force, reducing older people's esteem, discouraging older people's efforts, delaying recourse to needed medical care, or proscribing appropriate regimens for rehabilitation. (NIA 1990 pp32-3)

b) **As far as influence on learning potential is concerned, social environment and personal history far outweigh factors intrinsic to the ageing process** – so much so, in fact, that the questions worth asking are not "Can older people learn?" or "How much worse at learning do they become?", but "What do they need in order to fulfil their potential?" and "In what ways do they learn differently from young people?"

From the perspective of a laboratory researcher:

> Although our work is, necessarily, carried out mainly through isolated laboratory tests, it continually forces us back to larger questions of how the elderly make sense of their lives and the environments in which they

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> find themselves . . . A science of gerontology which has nothing to say about what being old **feels** like, how elderly people see themselves in relation to the world, and how they attempt to understand their lives and to manage their interactions without embarrassment and pain will be a paltry, pseudoacademic exercise. It will not even succeed on these meagre terms because it will totally miss the point of how people feel about themselves, and how the nature and quality of their achievable social interactions, feeds back to determine how well they can maintain the everyday functional efficiency of their cognitive processes. (Rabbitt 1988 p.506)

c) **If we find difficult the measurement of children's learning and the factors which influence it, the measurement of older people's learning is infinitely more so.** From front-line researchers to day-to-day discourse we are some way from grasping the variations required in our understanding of such notions such as intelligence, skill and, even, wisdom.

From Baltes' and his colleagues' distillation of years of concerted research:

> Because of the underdeveloped state of a culture of old age, we know very little about the developmental potential of older persons. As was true in earlier times for other age periods such as infancy and childhood, it takes an extended period of societal effort and much technological investment before the kind of differentiated culture of old age will have been reached that would uncover the latent potential of old age and empower older persons to choose among various opportunity structures. (1991)

These quotations are enough to make the point. Older people do have difficulties in learning. Some of these difficulties are a function of their place in history, others are more closely associated with their age. To underplay the difficulties does them no service. But the potential remains to be explored and developed. But (as the Inquiry's study of health reports) if education and training is provided which maximises the potential of older learners by giving sufficient time, ensuring that they understand the task and providing a motivating and supportive environment, they will probably be as successful as those in any other age group.

3.2. BARRIERS TO PARTICIPATION AND ACHIEVEMENT IN EDUCATION AND TRAINING

3.2.1. INTRODUCTION

One very basic assumption is made: that more older people would participate if genuine opportunities existed. There are many third agers who are simply not interested in organised learning – who prefer to devote their time to other things. Although, such feelings can be said to constitute "barriers" to participation, as far as the individual is concerned they are not. Freedom to abstain even from informal learning must of course be observed. But there remains a significant challenge to policy-makers and providers of all kinds to remove the constraints which inhibit genuine choice.

Studies of participation in adult education abound, building on the classic study by Johnstone and Rivera (1965). One common typology of barriers is the threefold one of attitudinal, institutional and situational, (Cross 1981, ACACE 1982). The first category refers to people's attitudes, the second to the policies and practices of providers and the third to the circumstances in which potential participants exist.

We followed tradition in using this threefold typology in our own fieldwork, applying it in turn to third agers and to providers of education and training. But it is clearly impossible to distinguish them definitively. The same issue may present itself in different contexts: 'cost', for example, is a 'situational' factor for individuals, but is not satisfactorily seen as a problem for the individual alone, since it affects institutions as well, very significantly. Moreover, barriers are not only to do with whether or not people participate. The same issues often affect the extent to which they learn successfully and enjoyably. Someone may manage to find the money for fees, but only at the cost of significant stress to themselves or others; or may enrol and persevere, but gain little because of poor teaching or a low-quality environment.

3.2.2. THIRD AGERS

3.2.2.1 Attitudes

The most deep-rooted attitudinal barrier may well be that of third agers towards their own ability. This is encapsulated in the cliche 'You can't teach an old dog new tricks' – a phrase which some commentators feel is so destructive that is simply should not be cited, however critically. This attitude may cover ability generally; or it may reflect a significant distinction between ability to learn and ability to profit from organised study.

This brings us immediately to an example of the interrelation between categories. Such an attitude may be an independent judgement of educational provision; or it may reflect the person's view of education. This in turn may be well-founded or not.

> A disturbingly large proportion of the public has a stereotyped view of learning dating from school experience. Many believe that all forms of post-compulsory education are formal, inflexible and examination-oriented, and that participants will be judged on their ability to meet certain standards. Feedback from former non-participants who have enrolled in special or targeted learning programmes invariably includes expressions of surprise at the scope, relevance and informal nature of some educational opportunities for adults. (McGivney 1990, p.22)

In the workplace, employees may not present themselves for training for similar reasons, but also for a rather different reason: because they do not believe that training will bring them any benefit in their existing occupation or as a help to change occupations. Again, this may or may not be based on an accurate view of their job prospects within the organisation or in the (local) labour market (Taylor and Walker 1991).

3.2.2.2 Situational Factors for Third Agers

a) **Cost** may be a major factor. The evidence is not straightforward. McGivney reports that in her own research cost was not often cited as a factor, and that it has frequently been found that those who do cite it have an inaccurate idea of what the costs actually are (1990, p.18). Analysis of 1699 counselling interviews conducted by one Educational Guidance Service in 1990-91 revealed finance as clearly the most common barrier, mentioned in 325 instances (NAEGA 1992 p.2). Whenever fees are significantly increased, as in the late 1970s and again at the current time, there is a sharp impact on participation rates, most obviously for those for whom such expenses are more than marginal. A 1992 NIACE survey found that average charges for non-examination evening classes rose by 15.7% in 1991/2.

In some forms of provision, concessionary rates for third agers are widespread, notably in local authority and university extramural classes, but it is not easy to find a coherent and equitable basis for them.

b) **Time** at first sight should be less of a problem for most third agers than it is for the population as a whole. Those who are still employed are less likely to have domestic responsibilities. It could even be seen as a positive sign if older people do not have enough time for studying, if this implies they are busy with other things. Yet time does still figure as a factor, often because of commitments to do with child- or eldercare. It is not only time but timing. Many older people are reluctant to go out at night, when it is colder as well as darker.

c) **Pressure** from peers and/or family may deter individuals. This may be to do with the disruption caused to a household by one of its members studying, or with the attitudes of others to education: the suggestion that the potential student is getting above themselves.

d) **Transport.** Mobility can be a major problem for older people, especially where public transport is inadequate and/or expensive. This is one of the reasons why the Open University is so successful in attracting third agers. The Housebound Learners scheme (see in section 3.3.) is an excellent example of an initiative which removes this problem for the learners. This is a policy area where coordination between authorities is required. It is especially important in **rural** areas.

e) **Health** problems can deter even the most motivated of learners. These may be related to the previous heading where there are difficulties to do with physical mobility, or to such factors as hearing loss which discourage participation in classes.

f) **Information and guidance on education and training.** Knowing of the existence of provision is a prerequisite for participating, and the NIACE study revealed some differences in awareness of local provision, with ethnic minorities significantly less aware (Sargant 1991, p.85). More important than simple knowledge of this kind is the availability of effective and impartial counselling where the individual can get a clearer idea of how far what is on offer matches his or her own needs. In most of the agencies responding to our survey of educational guidance workers, less than 10% of the clients are over 50, and the importance of active outreach work to bring information to potential clients was repeatedly stressed. Within this rather limited number, diversity of needs was emphasised:

"There are two distinct groups (at least) in the 50+ age group: those who are genuinely retired and looking for general interest courses, and those who wish to find a job after taking a vocational course. Their needs in terms of educational guidance, educational opportunity, finance, attitudinal change (for themselves and society as a whole) can be very different. It is not realistic to assume that people have a lot in common simply because they are 50+."

3.2.3 EDUCATION PROVIDERS AND EMPLOYERS

3.2.3.1 Attitudes

The factors mentioned in section 3.2.2.1. have their mirror image in the attitudes of educational providers and employers. These range from the well-intentioned but misconceived to the blatantly discriminatory. This applies at different personnel levels, from senior management to those delivering the education and training.

3.2.3.2 Institutional Factors for Education Providers

a) **Organisationally**, there are a number of factors:

- The **environment** of the institution plays an important part. This has both a **physical** dimension – whether or not the classrooms are easily found, accessible and suited to adults – and a **social** one, which covers the atmosphere created by staff and fellow students.
- **Flexibility** of provision covers issues such as the appropriate scheduling of classes – time of day, point during the year, length of session – and the responsiveness of the institution to student needs. For example the social dimension of learning is particularly important for older people, they may well wish for classes to continue over a longer period to allow social relationships to be maintained.
- **Location** reflects the concerns about accessibility and transport noted above. There may be significant managerial and other costs involved in making provision physically more widely available.
- Institutions may need a specific **policy** on older adults which recognises both their value as learners and their specific needs. Serious institutional commitment to increasing access requires machinery for implementing policy (Reid 1991); where this is lacking good intentions may remain just that.

b) **Pedagogy/andragogy**

There is considerable debate over how far older adults require specific educational techniques (see Glendenning 1990 for a discussion of the different meaning and forms of educational gerontology and associated terms). There is no ideal formula; but there is frequent agreement that more needs to be done to develop educational methodologies based on an improved understanding of the learning processes of older adults at almost every level, from the theoretical to the highly practical, inside and outside the classroom. The central issue here is to do with control, especially over the pace and content of education. This is not a simple concept, and obviously has different applications in different contexts: sharing control over a training programme will mean something rather different to sharing control in a reminiscence class.

Major components of the knowledge base necessary for improved educational methodology already exist. The primary weakness is arguably in the translation of this into practical curriculum development and teaching skills, those two terms being understood very broadly, to include a wide range of learning. This is a problem at institutional level which reflects wider cultural assumptions.

3.2.3.3 Situational Factors for Education Providers

Both cost and time are factors which affect institutions as well as individuals. Increasingly, educational providers are obliged to be more cost-conscious; in many instances their room for manoeuvre is now relatively constrained. Colleges, for example, will be under substantial pressure to concentrate on provision which earns revenue. Since time is money, provision which involves a lot of outreach work to attract students in, or to take provision to them, becomes more of a liability.

The institutional counterpart to information as a barrier is the difficulty of providing good and impartial guidance. In the field of educational/careers guidance, the main barriers to the communication of information seem to be: lack of resources among providers to allow them to devote sufficient attention to the needs of older clients; the pressure on some providers to channel inquirers into courses offered by the organisation they represent rather than offering independent, client-centred advice; the move towards assessment as a replacement for guidance and counselling. Collaboration between agencies is essential but difficult (see UDACE 1987).

3.2.3.4 Employers' Attitudes

Within employing organisations attitudes are crucial at a number of different levels, from senior management's position on the recruitment and deployment of older workers through to the attitudes of training personnel to their potential as learners. In the United States, for example, a Commonwealth Fund report cites the greatest impediment to the retention of older workers as "management's belief (that aging necessarily means declining health and safety, motivation and productivity" (Moloney and Paul 1989, p.8). The CBI **Workforce 2000** report observes (p.96): "Most of the negative preconceptions are almost entirely subjective or anecdotal and they are starting to change." The

Employment study for the Inquiry notes employer misconceptions about turnover rates and length of service amongst older employees (IMS 1991 Chs. 1,6).

3.2.3.5 Institutional Factors for Employers

Institutionally, questions of the training environment are equally relevant; to these should be added that of work organisation and how this may be adapted to make the most of older workers' abilities and experience. Methodological issues apply as much to training as to education: "much training is designed for the learning styles of younger people and new entrants and when employers find older workers do not train well this way they may conclude they cannot be trained." (Killcross and Taylor 1991, p.6).

For both third and second agers, it is not simply a case of boosting the overall volume of training and encouraging those with low initial education levels to participate. If the organisational context does not allow the skills acquired to be put to use and to be properly rewarded, this can be a serious deterrent. Managers may be unwilling to take seriously the ideas generated by newly-trained members of their workforce, causing frustration and lack of motivation. Removing barriers to training may entail institutional change at several levels, including training for all managers in the practice of human resource development.

3.2.3.6 Situational Factors for Employers

Finally there are two aspects relating to cost. The first is that training is, of course, an immediate cost, in terms of direct expenditure and of income foregone. The second aspect is less obvious. According to **Training in Britain** only 19% of training establishments make any assessment of the benefits of training, and only 3% attempted to measure benefits against costs. The absence of a rigorous and properly framed methodology for evaluating training almost certainly acts against an effective human resources policy in respect of older workers. (see Mayhew 1991).

3.2.4 GOVERNMENT AND SOCIETY

Barriers at two other levels can be mentioned summarily. Governmental attitudes can be a major barrier, both where they embody overt discrimination and where they fail to give a lead in combating negative attitudes. Situationally, governments at national and local level are moved by political pressures. Where there is no pressure for action on behalf of the third agers, other priorities will take precedence. The economic climate obviously influences the level of resource commitment possible to increase access and improve quality.

Finally social prejudice, exhibited through attitudes embodied in individuals and through social institutions and discourse, can be a major barrier.

3.2.5 CONCLUDING REMARKS

The significance of these various barriers will vary across different groups and contexts. The results of our own fieldwork reveal an interesting divergence in the weightings given to particular types of barriers by different kinds of respondents. Education/training professionals (adult education providers, researchers, trainers of volunteers and educational guidance workers) all agreed that the **attitudes** of (or about) Thirds Agers were crucially important, and most felt that the practices of educational institutions also presented substantial obstacles, with situational factors least significant.

Employers, current participants (including U3As), and non-participants, on the other hand, all appeared to see issues arising from their **current situation** as the greatest inhibitors – lack of finance was a concern for all these groups; transport problems and lack of time were prominent features for users and potential users. Most of these groups felt that attitudes were also significant obstacles with institutional practices being least important. (Users saw attitudes as less of a difficulty than institutional factors.) This second pattern reflects the concerns of the non-participants questioned in McGiveney's 1990 study. These findings, together with users' emphasis on the importance of accessible information and taster opportunities reinforce the value of outreach work.

Almost all of the barriers discussed above are not unique to third agers, but are relevant to learners of all ages. Naturally, they have different probabilities of being relevant or important to the third age: health, for example is almost certainly a factor which impinges more strongly on older people's motivation and ability to participate than it does for other groups. In most cases, though, no absolute difference appears between the position of older and younger learners. There are clearly specific measures which could be – and are being – taken to promote participation by older learners. But the overall conclusion is that older learners form part of the general population, and share their problems. **In short, overcoming barriers for the third age entails overcoming barriers for the second age, and vice-versa.**

3.3 GOOD PRACTICE IN EDUCATION AND TRAINING FOR THIRD AGERS

In our primary research, we approached the issue of "good practice" from several angles. Respondents were asked for **examples of good practice** and for **criteria** they use in identifying such examples, but also about **future developments** they would like to see, and the most important **step forward** in encouraging education/training for third agers. We have illustrated this section with selected quotations from respondents, and with descriptions of a small number of the organisations/schemes emerging as examples of good practice, taken from a range of areas – established providers of education/training for third agers, groups where informal learning takes place, oral history work, intergenerational projects, and the workplace. We are here reporting, not prescribing.

The findings on good practice highlight the following areas: attitudes (societal/government/employer/provider/third age); policy and funding; information and guidance; practice in educational institutions and in the workplace; research. While many were able to point to particular examples of good practice in the field, the overall impression is that there is a very long way to go in achieving good practice on a large scale, and that we are in danger of slipping further away from that goal. The field is full of good ideas, but optimism and enthusiasm suffer when it is difficult or impossible to put such ideas into practice.

Bedford Retirement Education Centre

The Centre was established in 1977 by Bedford College of Higher Education in co-operation with the Bedfordshire Pre-Retirement Council, as a result of research into the needs of those retiring. Located in its own detached premises, it specialises in preparing people for retirement, with around 15 courses each year, and offers in-house pre-retirement courses for companies throughout the county. These take the form of 10 half day sessions or a two day seminar, and cover finance, legal issues, housing, health, caring, personal relationships, leisure activities and voluntary work possibilities. REC also offers one day information sessions for those just about to retire, a one day financial planning seminar, individual time-management guidance, and a two day mid-life planning seminar.

It also organises around 50 post-retirement study courses every year, with 570 enrolments in 1991. One of the Centre's aims is to "provide facilities in which retired people can continue to exercise their mental abilities within a stimulating environment", and to make the range of courses on offer "as comprehensive as possible". The post-retirement programme includes arts and crafts, languages, literature, history, photography, yoga and lip reading; educational visits in the UK and abroad are also organised. Fees for each course are £3, plus a £20 p.a. subscription to the Centre. Those on low incomes can apply for remission of fees.

The importance of the social aspect of involvement is stressed, and students can meet in a coffee lounge. They are also encouraged to volunteer to help with the running of the Centre, and may, for example wo/man the front desk in between attending classes, or join in one of the many sporting/recreational activities also offered at REC.

Judging from comments supplied by users, REC is succeeding in the aims described above:

> *"The vast amount of information learned from meeting people at this centre, and the company and companionship we find"*
>
> *"The REC should be a model, with students having a part in the provision, but with skilled tutors, etc"*
>
> *"Reciprocity of ideas and exchanges of views in an orderly and intelligent environment"*

Involvement in organised learning, in the workplace as well as in educational insitutions should (and does) produce various kinds of positive outcomes. These can be divided into three types:

a) **benefits relating primarily to work** (paid or unpaid) – where education/training help the individual to find work, to perform work tasks more efficiently, or to run a business. For example, after training, older workers:
"– appear to be better disposed to the company, and their younger colleagues are impressed" (employer)
"It increases the knowledge and confidence of older adults to take on tasks they were previously wary of, for example working with the handicapped or seriously ill" (trainer of volunteers)

b) **benefits relating more to the actual subject studies** – where knowledge of a subject/skill is increased, perhaps involving a qualification
"People want to know more about what they're reading about in papers and hearing about on the news – it's the sign of a healthy democracy" (provider)

c) **benefits relating to more general aspects of the participant's life – improvements in physical, mental or emotional wellbeing.**
"I stumbled across a subject that interested me a year past February and have been researching it ever since. I can often lose myself in it, and forget the pain, unless it is too bad" (female, 60s, with spinal osteoporosis)
"[Joining a class] really opened up another world for me . . . I never wrote in my life! I was nothing behind a desk! . . . I'm getting more confident in myself now. I've got to think a lot" (male, 60s, in adult education [AE])

The Norfolk/Wandsworth survey showed a consistent pattern of students reporting benefits which exceeded their original expectations and motives, especially in the areas of increased confidence and social interaction:

Aim	% stating aim	% reporting benefit
to keep my mind active	72	72
to develop knowledge of a subject	64	[illegible]8
to make new friends	45	57
to develop a practical skill	40	42
to gain more confidence	35	40
to have some time away from home	33	40
to make up for opportunities lost when younger	32	36
to develop skills for further study	23	27
to develop my qualifications	11	25
to develop better health	22	23
to be more involved in the community	21	22
to develop a sporting skill	6	9
to help me get a new job	5	9
to help me in running a business	6	7
to help me in my volunteer work	15	15
to help me with my current job	9	9
to do something creative	48	40
to improve my career opportunities	8	7

Senior Studies Institute, Strathclyde University

Inspired by the U3A in France, the Institute began life in 1987 as the Learning in Later Life Programme, part of the university's Continuing Education Centre's Extension Programme. The aim was to provide classes specifically for the over 50s. It now enrols over 1000 students a year on more than 80 courses. These cover languages, history, art, literature, health and fitness, and skills (including computing, video production and counselling). Fees vary for different classes, but are around £30 for a 10 week course. Some tutors are ex-students.

Students can opt to study on a part-time certificate or degree programme within the university's Faculties of Arts and Social Studies, or to become Associate Students in these faculties, joining in undergraduate classes (not tutorial or exams).

Student involvement in the life of the university is very much encouraged, particularly via the Learning in Later Life Association, a student body of 450 members, linked to the main student union and the university staff club. The "Ls", as it is known, includes nine subject clubs, most of which serve as follow-ons to classes, and one which consists of those wishing to do voluntary work for the university. It also organises cultural and social activities, including exchange visits with similar organisations in Europe.

In an attempt to involve more working-class people in learning, the Institute has developed outreach courses for Third Agers in several areas of Glasgow, with the support of the UFC and the regional council. In 91 these included art appreciation in a community flat, German and dance classes at a secondary school, and reminisence in a residential home. Students' (and tutors') comments on the courses were very favourable; for example:

> *"The body maintenance exercises made me more agile, so I had less difficulty getting on to the bus"*

"I had never tried calligraphy before but I have enjoyed this course"

More detailed and varied research is needed on this. Indeed, it would mark a great step towards good practice if all those providing education/training for Third Agers should seek to evaluate its effectiveness, drawing on an array of indicators (the sorts of outcomes described above, enrolment/productivity figures, qualifications gained, forms of progressions) and a range of methods (observations, discussion, evaluation forms), especially those which involve the students themselves.

Learning activities for older adults which challenge stereotypes and convey the message that age is an asset rather than a liability, are welcomed by users and providers alike. This view is underlined by the large number of respondents calling for changes in public perceptions of old age, and also of education/training. Good practice in the education of Third Agers can only really flourish in an atmosphere of encouragement – supplied by other people in general, by the government, the media, employers, and by education providers.

> *"Increase the plausibility of study, and emphasise that age is no barrier to academic achievement" (educational guidance worker)*

Such encouragement for Third Age learning needs to be embodied in positive policy and funding measures, which, for example: ensure that every LEA has an Older Learners Officer/Adviser; improve education/training provision for Third Agers; create a national body to disseminate information on the range of activities available to those over 50; support national campaigns promoting learning in later life; eliminate age barriers preventing access to education/training, employment and to grants for study; abolish the state retirement age; offer financial support to employers recruiting/training older people.

> *"Find ways to reach into all sections and classes of society. Government action [is] needed to promote, and realise, the idea of education for all of life" (male, 60s, in AE).*

> *"Raise the level of local authority priorities regarding us 'recycled teenagers'" (male, 60s, in AE)*

Information and guidance services covering learning, employment and voluntary work opportunities should be improved, and publicity on existing provision stepped up, making better use of TV, radio, newspapers and magazines. Taster sessions are important, including special introductory events (bi-lingual) for ethnic minorities. More liaison between providers of information/guidance services is recommended.

> *"The things that I found out that were available for women – it was really astonishing" (female, 50s, in AE)*

Learning in Retirement Centers

'LIR' is the generic term for a range of institutes based within U.S. universities catering for older learners. Now numbering over 100, LIRs originated in New York (New School of Social Research) and California (U.C. Berkeley). Each LIR has its own remit and character, but specifications include:

– access to the university's facilities, such as libraries, swimming pools, language laboratories and dining rooms

– accommodation for peer-teaching groups

– intergenerational learning & training for community services through programmes such as N. Carolina's LAS (Leadership Asheville Seniors) initiative

– access to university lectures (auditing) at low fee levels.

LinkAge

LinkAge is a charity which aims to foster links between alternate generations. A report from work it has carried out in Oxfordshire on links between schools and older people made the following points:

1) The greater majority of schools do have a link of some sort with older members of the community. However, the joint activities overwhelmingly take the form of the children "entertaining" or "helping" the older people in some way; they are thus encouraged to think of them as passive recipients. Reciprocity should be the key concept.

2) Oral history is one of the major ways in which older people contribute and are recognised as a valuable resource. But there is a danger in seeing older people as "walking history books" and of assuming that what is interesting about them is their past.

3) Amongst other suggestions:
a Schools and local authorities should make a clear commitment to intergenerational work
b Older people can help as volunteers in the classroom
c Skill-sharing and oral history: older people can demonstrate their skills
d Classroom teachers and community education workers might benefit from awareness training and improved liason with other services/agencies.

Source: Goddard (1991)

Education for the older unemployed needs to be properly valued and broadly conceived. There are major obstacles to be overcome even in getting the problem recognised, given the available disguise of 'early retirement'. A REPLAN report points to aspects such as flexibility ('roll-on roll-off' course structures), use of accreditation of prior learning, extensive marketing and good staff development as key characteristics of good practice (REPLAN 1989).

The overall message to educational institutions is that they need to be outgoing (via outreach), more welcoming, accessible, aware, encouraging, supportive, responsive, willing to take risks, and flexible (like all those wanting to make new friends, in fact).

In regard to the **users of such provision**, these should include more **male** and **ethnic** minority Third Agers, and those in **rural** areas and **residential homes**. The existing skills and experience of third agers needs to be acknowledged/accredited. Older adults must be encouraged to design, fully participate in, and teach on programmes. There is disagreement as to whether age-segregated provision, or mixed-age activities, is best (although cross-generational work is advocated); again, flexibility and a range of choice seems to be the answer.

As to **approaches and environment**, courses should be challenging and have clear – but flexible – goals. Tutors should be well-prepared and friendly, and they should be aware of how older adults approach learning. The atmosphere needs to be informal and relaxed. Premises should be accessible (near public transport, and suitable for the disabled), comfortable, and well-equipped, with facilities for social interaction between participants. A wide range of classes should run in the daytime, and fee concessions should be available for those on low incomes.

"[Some] lecturers really appreciated the older peoples' desire to clarify and question" (female, 50s, in higher education)

Oral History and Autobiography in Education/ Training for the Third Age

Oral history is the recording of the living memories and reflections of all kinds of people, many otherwise hidden from history. It creates a more vivid picture of the past, which is of great value not only for historical writing and radio or television programmes, for school education, and for community history, but also for old people themselves.

Oral history is closely linked to written autobiography and has many of the same advantages. It helps older people to reflect on their earlier lives in a positive way which builds up their self confidence in dealing with the inevitable changes they face in later life. This is principally because their earlier experiences, instead of seeming irrelevant, are turned into resources on which they can draw. To be seriously listened to by a younger interviewer not only helps to bridge the generation gap, but reinforces the older person's sense of meaning in life. As recent studies have shown, this is central not only to mental but also to physical health in the Third Age.

Community history programmes using oral history and autobiography, which were extensively financed during the 1980s by the Manpower Services Community Programme, were also used specifically to provide training in a range of skills which are of general value: how to listen and communicate in an interview, how to transcibe and type it, how to evaluate and explain evidence, and how to use the material collected through writing, editing audio and video cassettes (typically for local schools), editing and publishing desk-top booklets for local circulation, and mounting displays and exhibitions including texts and photographs for local libraries, schools, museums and hospitals . . .

The termination of the MSC Community Programme, the abolition of the Greater London Council, and the increasing restriction of local authority funding to mandatory statutory work alone, has left community oral history with no funding base. Currently only a small number of projects have been able to remain active. Yet these multi-dimensional community projects offered an economical linking and energising dynamic between normally disconnected public services for people in the Third Age. We see them as a model form which ought to have a key place in any programme for the education and training of older people.

Source: Paul Thompson, Director, National Life Story Collection

Third Age Education in the Third World

That education is not an unreservedly "good thing" is a point made by those working with older members of "traditional" societies – whether these are in the Third World, or minority ethnic people in developed countries. Such older people may – at worst – be abandoned by their "educated" children and grandchildren, or – at least – find their knowledge, and themselves, very much devalued. However Ken Tout of HelpAge International argues that educational work being done with older adults in the Third World, or those who work with them, has much to teach educators in our society. This takes various forms:

- *raising public awareness about the situation, needs and skills of older people*
- *providing training for those who care for older people*
- *the re-orientation of elders – providing skills they can use to earn a living; to deal with a new environment; to cope with disability.*

A good example of this last type is Pro Vida Columbia's CIGAL project, which involves attempts to restore intergenerational solidarity by training school students to help older shantytown dwellers with health and other issues. In Jamaica, school students record the memories and traditional skills of older rural inhabitants in order to establish a "Memory Bank". In countries such as Columbia there is a demand from some older citizens for opportunities to study at a higher level, and for mid-career diversification. In Costa Rica pre-retirement education is being organised to help employees adjust to the unfamiliar pattern of industrial working life.

Source: Tout 1992

Housebound Learners

Housebound Learners is a project designed to enable housebound people in Wandsworth to take part in adult education. The principle is one of "learn as you go". Each week volunteers attend a class in a subject which interests them, and they then pass on what they learn to their housebound partner(s). The volunteers are recruited through personal visits to adult education institutions and by leafleting, and are carefully matched to a housebound student by the co-ordinator. The intention is not only to draw constantly on the volunteer's goodwill, but to make sure that they themselves benefit educationally. Subjects chosen so far are in the fields of history, craft, media studies and the arts. Most of the students are elderly. Over the last two years upwards of 100 students have taken part.

A broader **curriculum** within educational institutions is often recommended, and the subjects suggested include: more/improved pre-retirement courses; outdoor education; Second Chance to Learn; basic rights; redundancy counselling; computing; history/reminiscence work; women's issues; environmental studies; languages; arts and crafts; current affairs; social sciences; spiritual education.

Learning based in the workplace should include ongoing skills training, training for occupational change, personal development and extended pre-retirement education. The Employment Department has produced a good practice guide aimed at TECs and employers. This spells out that older workers are "needed and valuable" because (amongst other positive characteristics) they are loyal and committed; are inquiring and enthusiastic; are willing to work flexibly; and are less prone to accidents, and to take sick leave. The guide identifies the following as key issues in encouraging older people to train:

- hearing or reading about successful trainees in their own age group
- a non-discriminatory attitude on the part of the employer
- a flexible retirement age
- flexible working hours
- more publicity about training opportunities
- feeling that their fears are understood by trainers and employers

This last point involves reassuring older adults that:

- they will be able to work at their own pace
- their life experience will be seen as an asset, and utilised in their training
- the training will have a practical content and approach
- their new learning will be used in a job
- there will be someone to help them overcome their initial problems
- they will be treated as individuals

In addition a chart is provided which maps out how these features can be implemented in practice, and what "bad practice" looks like (Employment Department 1991).

In practice very few companies have taken a positive approach to skills development amongst older employees. The well-known case of B&Q, with its pioneering Macclesfield store staffed only by third agers, now followed by several others, and with the recruitment of older workers linked in with their training and development, is exceptional. The French example cited in this section shows a positive approach to the utilisation of third age human resources.

> *"[Employers should] cease to use age discrimination as a selection tool [for recruitment and training]" (educational guidance worker)*
>
> *"Persuade employers to allow time off for study – similar to 'day release' facilities given to younger members of staff" (male, 50, employee)*

Professional Training in France

French law requires that a percentage of the total wage bill – 1.5% in 1993 – be spent on professional training. Most of this is on corporately defined needs, but one sixth is on individual needs. French policy on early retirement has undergone a dramatic reversal in the last decade, as employers realise the loss of expertise and experience involved in jettisoning older workers, and the government becomes aware of the public expenditure implications. As a consequence, serious attention is now being paid to the training of older workers. Nationally, the law of August 1989 provides for the funding of professional training of employees over the age of 45, specifically for those vulnerable to technological change. Large companies such as Aerospatiale and les Assurances Générales de France, facing a workforce with an increasing average age, are taking measures to remove age limits on training and to promote personal development plans for all workers, including older ones. AGF's Argos programme caters mainly for those over 40 and covers training in French, statistics, insurance and communication.

Source: G. Reday-Mulvey, Geneva Association

Pitney Bowes

This large American employer has implemented a retirement education assistance scheme which encourages second agers to develop the learning habit. Employees and their spouses aged 50 or over are eligible for reimbursement for educational expenses up to $300 per person per year, up to a maximum of $3000 per person. The entitlement continues for two years after retirement.

Shell – Retirement Planning

As a major employer Shell has been in the forefront on pre-retirement education generally, with courses of 5 or 6 days. The key feature of the Retirement Planning courses is that they occur 10 years before retirement age. They were introduced in 1986, in response to feedback on orthodox PRE courses which made it clear that respondents would have appreciated the information more if it had been made available earlier.

The content of the course is quite traditional, concentrating primarily on financial aspects of retirement and pension planning; but by bringing it forward Shell give their employees encouragement to begin planning their move into the third age well ahead. The main pre-retirement course still takes place near the actual date.

Examples of good practice in pre-retirement education are more common than in training for older workers, despite the overall low levels of PRE. Work at the Centre for Health and Retirement Education identified those areas which, according to curricula content, were considered relevant to older people. Finance and health predominated, then interests/hobbies, with housing and personal philosophy less significant. But the "traditional" approach, involving information-giving sessions based on a hierarchy of needs has been challenged by Coleman and Chiva, who, on the basis of extensive work in the area, propose instead a process-orientated "Coping with Change" model. This emphasises "gaining insights, not . . . accumulating information" (Coleman and Chiva 1991, p3). The model suggests that pre-retirement and mid-life planning courses are structured around four themes – time, finance, health and relationships. While not denying the importance of access to information about services and opportunities, the model encourages older adults to acknowledge and use the resources within themselves – particularly in being able to identify one's needs and find ways of meeting them.

3.4 GOOD PRACTICE IN INFORMAL LEARNING AND INFORMATION SERVICES

We have pointed out how much learning takes place in contexts and organisations which are not formally designated as educational. We provide several examples which are specifically concerned with older people.

More widely, older people benefit from a range of **information** sources. The National Information Forum has put forward guidelines for the compilation, design and dissemination of information (in the form of a guidebook to local services) for older people, as follows:

- involve representatives of the groups at which the information is aimed at the development and piloting stage – this is particularly important for minority ethnic people, who may have gaps in their background knowledge, rather than simply in their understanding of English

- the information presented should be comprehensive and accurate, but concise and unintimidating
- include information in the guide on positive topics (holidays, etc), and not simply on problems/crises. "Embarrassing" issues (sex, incontinence) should be treated in a matter-of-fact way, and flagged separately
- where possible, reference local organisations/contacts, rather than national groups
- include an introduction explaining what the guide covers, who it is for, and suggesting that the user starts by reading the whole guide for an overview of available services. Include a table of contents, and an index if the guide is very detailed. Include cross-references
- write it in very simple language (without being patronising), as near to ordinary speech as possible. Avoid jargon. Divide the text using clear heading in the form of questions, and marks at the edge of pages. Use enough white space to break up the text, but not too much (this causes problems for those with restricted eyesight). Use fairly large print; avoid overuse of capital letters and bold print. Avoid gloss paper and light inks. Use some colour if possible, but not for headings. Highlight addresses for quick reference. Make the guide pocket size, with a sturdy cover and binding
- use "passive delivery systems", placing the information where people are likely to come across it in the course of their everyday activities. To work well, this involves personal visits by the distributor to outlets such as shops, community centres, churches and local groups
- more powerful are "active distribution systems", using the Royal Mail, commercial direct mail firms, milk delivery staff. The latter is cheapest and most effective because it can be selective.

(From **Getting the Message Across,** NIF 1991)

U3A South Australia: Characteristics and Aspirations of Older Learners

A partnership between the U3A and the Department of Education at Griffith University led to research covering 11 campuses and over 1000 U3A students. The involvement of the U3A Management Committees was influential in securing a response rate of 73% to the postal questionnaires, producing benchmark statistics on the characteristics and aspirations of U3A members

Third Age First

Among agencies created to help older adults find employment is third age First based in Wiltshire. This is a non-profit making organisation, financed by commercial income, charitable and local authority support, the European Social fund and company sponsorship, and run by the Community Council for Wiltshire. It employs seven part-time staff who, apart from training and recruitment work, address business and interest groups, organise conferences, and campaign at national level for changes in the law regarding recruitment and pension rights.

For employers, it offers low- or no-cost recruitment services, using a database on its job-seeking clients (manual, skilled and professional) and a screening process so that only selected clients are put forward. It organises "no-risk recruitment" involving a trial period before permanent employment is offered. Third age First provides life-planning courses, executive career counselling and redundancy counselling, as well as financial, benefit and personal counselling for job seekers, and help with starting up a business. Skills taught include interview skills, CV writing, assertiveness and presentation techniques.

In 1991, a total of 315 clients were registered (male, long-term unemployed predominating) with around 39% finding employment following training. The organisation is currently exploring the possibility of setting up other third age initiatives in other parts of the country, in association with the Reaction Trust.

Although it is often assumed that older people find computers intimidating or uninteresting, according to the 1988 Taylor Nelson survey 63% of those aged 45 – 65 claimed to use one, or to want to use one. Improving access to such facilities necessitates changes in the income level of less well off third agers or, alternatively, the provision of telephones, videos, computers, etc as community resources, as happens in Sweden, California, and in Manchester to a limited extent. The idea of a bulletin board specifically designed for older adults is feasible, relatively cost-effective and attractive.

The IT report for the Inquiry identifies the following areas in which new information technologies may benefit third agers:

a) The provision of information about education and training. This may be delivered at home, in libraries or at other access points.

b) Computer aided learning. This allows the user to proceed through a course at his or her own speed with some interaction, with the system checking progress as the course proceeds. The computer is patient and precise; the user can go over old ground as many times as is necessary without fear of embarrassment. This is particularly relevant to older learners, for some self-pacing is a crucial condition of successful learning.

c) Access to general civic information, enabling people to make use of public services of all kinds. In Santa Monica, California, citizens are able to use free computer terminals in community centres, libraries and city offices to communicate with city officials. Through a bulletin board they can access a wide variety of information: bus schedules, job openings and so on. A similar scheme for the elderly and housebound operates in Gateshead, which (being part-funded by Tesco) also allows users to order goods via the terminals, which are then delivered free.

There is a circular process in regard to IT. Education is itself needed to increase awareness of IT within the third age, and to encourage older people to appreciate the

Grandparents Federation

The Federation was founded in 1987 to advise and support grandparents with young relatives in care. Volunteer members speak to groups of social workers, magistrates and other professionals in order to foster a sense of partnership between them and the Federation in providing care for young people, particularly in the light of The Children Act 1989. The Federation holds open meetings for members, and publishes a newsletter, a pamphlet about the Act, and a collection of stories from grandparents with grandchildren in care. It has, in fact, played a substantial role in helping to change the law, and is regularly consulted by academics, the media and government departments.

The Federation organised training in presentational skills for those members involved in speaking to professionals. This experience played a part in enabling some members to win court cases over the care of their grandchildren. One grandmother (who worked as a cleaner and who had just had radical treatment for cancer) represented herself in the High Court, and was congratulated by the judge for her clear and concise contribution.

Opportunities in Retirement (Ayr) & Springburn Elderly Forum

These are two groups of older people in very different social contexts. They provide contrasting examples of informal learning activities which involve "empowerment", but of different kinds. OIR is a wholly independent organisation. It has over 1000 members, with a wide and growing range of leisure activities, including package holidays. Group leaders include a former badminton champion, TV producer and a computer expert. Its slogan is "OIR involves people, and the fuels that power people are involvement, enthusiasm, humour, enjoyment and self-expression"

Springburn Elderly Forum shares premises with its sister Disabled Forum, next to the local Social Work Department team in a declining area with no social amenities. It was set up in 1988 after years of campaigning, and is financed through the Urban Aid programme. The two forums have a joint membership of about 600, serviced by a staff of eight. Membership is overwhelmingly poor and working-class. The Centre provides subsidised meals, transport to and from home and paramedical service. Activities include sewing, cooking, reminiscence groups and bingo. The Centre also supplies advice and advocacy on welfare issues, and has been actively involved in a number of social campaigns on issues such as transport, fuel charges and concessionary fares.

Both groups have successfully responded to the needs of their local membership. OIR is educational only in the broad sense that active leisure can involve learning; the campaigning activities of SEF make it potentialy more educational in the sense of learning about power and acting on that knowledge. On the other hand, OIR is entirely run by members, whereas in SEF the staff do everything for the members apart from the campaigning. The Ayr group gave the impression that each member is an autonomous individual who controls her or his life. The Springburn group gave the impression that the majority of members are dependent, in some way "victims" of society and not in control of their own lives. But the dependency of the majority contrasted with the confidence and energy of the minority involved in campaigning.

Education and Information for Third Agers in Rural Areas: REAP and PIRATE

According to the Association of Community Councils in Rural England (ACRE) among rural households "the elderly particularly are suffering", because of cuts to rural services and the loss of local facilities such as village halls. While access to wide-ranging (or even to any) education and training is frequently difficult for such older adults, ACRE draws attention to the high level of mutual support often found in rural communities. (These comments are echoed in responses sent to us by U3As in such areas. When an education group is the only one for miles around, then tutor and students are forced to learn real curriculum negotiation, and flexibility. In rural areas, a two-way process can evolve: a learning group provides skills and knowledge which are then used to try and secure community facilities or employment opportunities (Honeybone 1991).

Organised by the local education authority and the Rural Community Council, the Rural Education for Adults Project (REAP), which ran in Norfolk from 1988-91, included several examples of groups for older learners, as well as work with those made redundant and women returners, and village-based community development courses. REAP "improved the flow of information to local people" on various matters, including educational guidance, but the project illustrated the difficulties of finding long-term funding and local office facilities for such work (Norfolk Rural Community Council 1991).

The Public Information in Rural Areas Technology Experiment Project (PIRATE)was set up in South Devon in 1984 by Devon Library Service, the British Library Research and Development Department and the Rural Development Commission. Now funded solely by Devon Library Services this provides a computer database of community information in local libraries and includes two sites which library services share with other agencies (CAB, volunteer bureau, tourist information, etc). Information is available through direct computer access, or via printed lists and an annual directory (which tend to be preferred by older users).

[illegible] 104

The Development Advisory Resource Group Project (DARG)

The DARG project, based on work done in the early 1980s by Age Concern Scotland included as one component a thorough review of older people's use of information which was funded by the Scottish Community Education Council. This also involved an experiment in the production of audio tapes of local information for older people, to be played by local radio stations, hospital broadcasting services, in shopping precincts, and by local groups. The project found that tapes could be produced cheaply, their production involved older people in new learning opportunities, and their content successfully challenged age stereotypes and raised the profile of older adults in the community at large. As a result of the DARG project a group was established in Lothian region for information providers to exchange ideas about their work with third agers, and work started on a scheme to provide a resource pack, a discount card, etc for older residents.

opportunities that it opens up for them. Currently few third agers have the requisite skills, and often lack the confidence to approach and master IT. This may change if training schemes are effectively targeted (like those currently being run for older adults at Lancashire Polytechnic and by a joint project involving the WEA, the University of Ulster, an FE College and Age Concern in Northern Ireland). Peer training in IT skills would have the added benefit of helping to break the stereotype.

Not only can new technologies multiply information sources, and provide better access to generalist information for the population as a whole, they can in theory improve the flow of specialist information aimed at particular sub-sections of the population (defined geographically, or by their special interests). We may see an increase in knowledge-based expert systems, currently used mainly by those advising older adults, but sometimes available to individuals themselves (current examples include the PRA's Friendly Retirement Education Database, Age Concern Scotland's CareData package and JiigCal's educational guidance program for older adults). More widespread use of IT will enable GPs to provide better diagnosis, drug profiling, and recall systems for older patients, will improve the assistance welfare rights advisors can offer, and allow increased networking between organisations providing services to third agers. This last however requires that standards be set in order to ensure compatibility of equipment, which is likely to be a long process.

Developments in telecommunications are already allowing groups such as the U3A in London to organise telephone conferences involving the housebound. Although the UK is lagging behind the US and some European countries in the use of satellite and cable TV, and although the latter is especially expensive to install in this country, they offer facilities which could in theory be of great use to older people. Cable, in particular, promises the possibility not only of community channels, but of interactive services, such as home-banking, – shopping and – security, and of enabling users to call up advice and information from the health centre or social work department, and choose from a menu of options. A two-way cable system in Ontario, for example, has several community channels and information services, with viewer response buttons.

Bradford Area Health Education Unit

In Bradford in the late 1970s the Area Health Education Unit initiated a collaborative venture to meet the needs of local minority ethnic peoples, including older adults. This consisted of:

- *the use of interpreters and specialised social services workers*
- *the production of leaflets in various Asian languages*
- *close liaison between the Area Medical Officer's staff and representatives of the Asian community*
- *the provision of neighbourhood language classes and home tutors*
- *educational projects organised by the local Community Relations Council*
- *seminars on Asian culture for hospital staff, and Urdu classes for professional workers*
- *a Transcultural Psychiatry Unit at a local hospital which ran workshops for members of different disciplines*
- *the compilation of a collection of teaching material in Asian languages*

Source: Rowell and Rack 1979

The National Gallery's "Micro Gallery" system

An example of the capacity for an IT system to communicate complex information in a clear and manageable form is the new 'Micro Gallery' at the National Gallery in London. The system contains information on every painting in the collection and allows the user to gain information on a particular artist, painting or subject matter. The information is presented on colour touch sensitive screens which also provide the controls to guide the user through the information. The system contains a complete illustrated catalogue of the collection. It is possible for the individual visiting the museum to find, read about, and see the pictures that s/he is interested in and then have a plan created of where those paintings are in the museum.

Seniornet

The US offers an impressive example of the benefits of home computers and computers at community sites; according to its newsletter, Seniornet aims "to create an electronic community of computer-using seniors who participate fully in the greater social and civic communities". With funds from a charitable foundation, it enables some 12,000 members in 41 centres to exchange information and views via computer, and organises conferences, training programmes, and research projects.

3.5 CONCLUDING REMARKS

Many of the barriers which hinder participation in organised adult education/training also bar access to information: lack of individual resources (money and confidence), and lack of suitable opportunities – in the right form, and at the right time and place; the existence of apparently unco-ordinated "systems" of provision (including public and private facilities); problems in finding an appropriate and independent guide to the relevant services/providers; failure on the part of providers to research local needs or to take into account existing research findings concerning the client group in question when planning provision.

In theory, developments in information and communication technologies could improve access to information and also to successful participation in education and training, although such developments highlight other needs – for access to equipment and to training in IT itself.

In all three areas, successful provision is that which (among other things): is tailored to the specific requirements and interests of the user group; allows user-evaluation of the issues concerned; and involves genuine interaction between provider and user, and among users themselves. Respondents emphasised the role of education and training in particular in promoting the talents of older adults, and in challenging negative attitudes towards them – the biggest obstacle to successful participation, not simply in education, but in society itself.

Finally, there are **calls for an increase in the amount of research on learning in later life (with researchers and providers sharing their findings and experience).** This should include longitudinal studies, anthropological/participative methods, multidisciplinary approaches, and also perhaps the drawing up of lifestyle profiles.

> *"Provide reliable data whereby one could analyse how older adults learn; what hinders and helps them" (researcher).*

4 OBJECTIVES & OPTIONS

4.1 INTRODUCTION: GENERAL AIMS

Present provision and participation, and the direction in which we are headed, need to be considered against the changing needs of the individual third ager in a changing society, and the wider objectives of society as a whole.

4.1.1 INDIVIDUAL NEEDS

4.1.1.1 Personal Enrichment

Our remit concerns the development of people: as economic and social beings, with spiritual and psychological needs, individually and collectively. In the third age, when the imperatives of earning a living and bringing up children recede, personal development can once again become a central concern. Education is for many a leisure pursuit in its own right. Some will choose to spend time on formal education, others will not, whatever efforts are made to appeal to them. If the third age is not to be defined purely in negative terms, as the release from obligation, then personal enrichment is a prime area of concern, and a key to mental – and almost certainly physical – wellbeing. Better formal and informal learning opportunities are needed to meet these requirements.

4.1.1.2 Individual Enablement

The society we live in is increasingly complex, and everyone needs the confidence and knowhow to discover choices and opportunities, and to make best use of them. This is perhaps particularly true of third agers, who are likely to have moved out of the dominant structures and imperatives of the family with children and the workplace. This provides new freedoms, but also means taking the initiative to seek out some selection of social, leisure and community activities, paid work, volunteering and so on, involving a network of links with various groups and individuals for different purposes. The problems of making a successful transition may be particularly difficult for those who retire suddenly without preparation, are made redundant, live alone, or lack money or good health. Adult education is not the only way of acquiring the necessary knowhow and confidence, but it can offer important help.

4.1.1.3 Information

If the overall objectives are personal enrichment and individual enablement, access to adequate information is an essential condition for achieving those objectives. Information is not just facts; it is guidance and advice about the key areas of paid work, volunteering and citizen activities, finance, health and education itself. In all of these third agers need to know what opportunities exist, and to have the knowledge on which to base important decisions affecting their personal lifestyles. In addition to traditional information sources and services, new technologies can play a major part in securing good access to appropriate information.

4.1.2 THE ECONOMY AND SOCIETY

We prefer to phrase this discussion in terms of the positive potential of older people. However there are compelling arguments to the effect that in the absence of positive policies there will be enormous costs to individuals and society:

- **Economically**, in the loss of skills and output, formal and informal;
- The **health** of older people determines their levels of dependency, with its enormous social and personal as well as financial cost;
- **Culturally** the potential waste is enormous, if almost impossible to quantify.

The employment study emphasises the important potential contribution of older workers and the need for them to have relevant skills, including those working in part-time, casual and contractual jobs and the self-employed. The loss to the UK economy caused by the expulsion of older workers in the 1980s has been estimated at £7bn (Bosanquet 1986). Training throughout life, on the job and externally, is crucial if the UK is to have a growing and high value added economy. The key issues are:

- The retention of skills;
- The development of new skills;
- Reconversion: the need for people to change jobs, careers and occupational identity;
- Returns on training: older workers have lower turnover rates so the return on training them is good, and improves further as payback periods shrink;
- Older workers as trainees/mentors: their potential as transmitters and developers of skills and expertise;
- Special training needs: there are groups which have particular priority – women returners, men retiring early from declining industries, and the older long-term unemployed.

Third agers contribute very substantially to society in many other ways than through paid work. These are only partly measurable in money terms. They include:

- voluntary activities: huge numbers are involved, with a very diverse array of existing and potential skills
- the value of services provided by carers, many of whom are in the third age, has been estimated at £15-24 billion annually (FPSC 1989)
- family roles: as parents or grandparents
- health: keeping themselves fit and independent, with little need of NHS or community cover (fees for nursing and residential care range from £100 to over £400 per week)
- their cultural contribution and role as 'cultural trustees' (Laslett 1989)
- their role in civic and public life, including committee and campaigning work.

Education, training and information have a major role in supporting all these activities by providing the necessary knowledge and skills.

To summarize: the need is for a new **social economy of the third age**. This would allow individuals to fulfil themselves, and to acquire the skills necessary for them to be able to participate, as paid workers, volunteers and citizens. Their enrichment and their enablement depend on sufficient levels of health and finance; these in turn require usable information. Education is at once the means by which third agers can understand their position, and the vehicle through which they can improve it for themselves and for others. We turn now to assess how well these requirements are being met, in the light of the findings of Parts 1-3.

4.2 FORMAL EDUCATION

4.2.1 THE PRESENT SITUATION: A RECAPITULATION

Provision in UK in terms of enrolments is predominantly through adult education provided by local authorities (48%), further education colleges (23%), WEA (8%) and university extra mural departments (9%). 5% of enrolments are in pre-retirement education, and the remaining 7% in the U3A, Open University and elsewhere. This mix of provision has great strengths; courses are on the whole short and locally available, which means that a larger number of people can be reached within a given level of resources.

The level and distribution of **participation** do however give cause for concern. The total number of enrolments in formal education is only about 750,000 annually, 5% of the total third age population of 14 million. The NIACE study in 1990 suggested rather higher figures if informal learning is taken into account – 23% of those aged 50-64 were or had recently studied or were learning informally, and 15% of those aged 65 and over.

The **present cohort** of third agers starts from a very disadvantaged position; some two thirds of those between 50 and state retirement age left school by 15, compared to about one third of younger adults. 60% of those aged 50-69 have no qualifications, compared to only 18% of those in their 20s.

Although there is no marked difference in the ages at which men and **women** left school, women have fewer qualifications than men, and the difference is more marked in older age groups. This balance is somewhat remedied in the third age, where women participate more than men, but men still continue to do more courses leading to qualifications. In terms of **social class**, participation is lower in social classes C1 and 2, and much lower in social classes D and E, reinforcing the disadvantage of those who left school early; whereas women are gradually catching up with men, social class disadvantage remains sharp.

There is a particular cause for concern in the lack of **pre-retirement education**, which has a very important potential role in relation to enablement.

As for **quality**, there is clearly much good work going on, in very diverse forms. There remains a concern about how much provision is sufficiently enriching and enabling. In particular, whilst some segregated provision for older adults is needed, there are often unwarranted limitations on the scope of what is offered, reinforcing rather than challenging stereotypes about older people's needs and potential.

A wide range of **barriers** exist which depress people's aspirations and levels of participation. These are to do with attitudes on the part of the clientele themselves, employers, providers and society at large; with factors such as the timing, location and physical environment of classes and the lack of information and guidance; and with broader factors such as the financing of education.

This brief resumé of the current position highlights one crucial point. **Many of the key issues surrounding the education of older adults apply wholly or to a very large extent to the population as a whole.** The quantitative and qualitative adequacy of provision; disadvantage and inequity; barriers to participation; and the need for a lifetime perspective – these are all problems which are common to all generations.

4.2.2. FUTURE PROSPECTS

Several policy developments at present being implemented may mean that the present range of formal provision may not be maintained, and that access by poor members of the third age may be particularly threatened. For the main providers the position is:

a) **Local adult education** – it is crucial that support for the heartland of adult education provision – in local authorities – is provided at a level which enables them not just to maintain their current efforts, but to give them fresh impetus. Expenditure on adult education in local authorities in England is under £5 per head of the population. Some local authorities have already virtually dismantled their provision and many others are cutting back significantly. Fees have risen substantially and discretionary grants reduced. For older adults, there is no sign that the issues and proposals generated by the 1987 UDACE report have been taken up. Instead, the atmosphere is at best one of determined defensiveness.

b) **Further education** – the consequences of the separation of FE colleges from local authorities are not easy to predict. As independent institutions they will have inbuilt incentives to give a low priority to community provision. There is also the vexed question of the relationship between community institutions and the FE colleges, where the former may wish to make provision but be subject to the latter's verdict on its desirability. The positive growth in third age enrolments in FE – up 14% in the last recorded year – is obviously very welcome, and FE colleges are rightly at last being given some recognition for the key role they play in the nation's educational and economic performance, but there must be concern over the implications for provision which is not given explicit national priority and is not linked to formal qualifications.

c) **University continuing education** – university extramural/continuing education departments have undergone radical change in the last few years, in their funding base but also in their corporate character. 'Extramural', in fact, is no longer an appropriate epithet, as in almost every case they have moved to a more integrated position within the institution. On the positive side, they have been able to undertake a diverse range of initiatives, often playing a key part in improving access to higher education of various kinds. Older people have shared in the expansion. Here too, however, there are doubts. Firstly the sharper focus has in some instances been at the expense of longer-term work, especially the kind of painstaking and resource-intensive outreach work which characterised the 'great tradition' of extramural work. Secondly, the 'mainstreaming' of continuing education within universities carries with it the risk of actual absorption; at times of serious financial stringency, the removal of earmarked funding at the end of the current planning period (1991/2-94/5) could entail the collapse of community-oriented work and the casting aside of the gains of the last few years.

d) **Voluntary bodies** – finally, voluntary bodies are having a very lean time, to the point where survival itself is at issue. The WEA is a case in point, where major uncertainties have prejudiced its ability to continue as a significant provider.

The key need is to take account of provision as a **system of interdependent parts**, with progression possible from one part to another (including from so-called leisure to vocational courses, [see McGivney 1992]). The system has evolved piecemeal, and has often been criticised for lack of coherence. Nevertheless the patchwork has displayed a pattern and appealed to many. There is a danger that the erosion of constituent parts is leading to a fragmentation at precisely the time when there is a strong need for individuals to be able to enter the system at many different points and to move around and progress within it. This applies both to the system as a whole and to institutions within it. If, for example, concessions are withdrawn, it will often be the case that a whole programme becomes unviable and collapses because of the absence of the concessionary students. It would be absurd to pretend that there is a universal 'for want of a nail' process; but there are clear signs of a significant unravelling process at work.

More generally, the whole thrust of education policy in the UK continues to be towards initial education. The 1991 White Papers broke crucial new ground in looking at adult and further education as a whole, and the emphasis on education relevant to paid employment is very important (see next section). However they concentrated very heavily on education of 16-19 year olds, and paid little more than lip service to adults. Education policy also still puts heavy emphasis on full time education, especially in the universities and polytechnics, and maintains a deep-rooted financial and conceptual bias against part-time study. This is not in keeping with the needs of a modern society to continue learning – and training also – throughout adult life, often through shorter and part-time courses which can be combined with other activities.

At present, much of the potential contribution of formal education to life in the third age does not express itself as a "demand", largely because those who have had little formal education, and perhaps experienced only poor quality schooling, do not think that education is "for them". In the longer term, as future cohorts start from a higher educational base, they are more likely to express a demand for continuing education in the third age. But demand and supply interact. If provision is reduced, fewer people will express demand, because they do not think it will be met. The immediate need is to try to reach at least an increasing number of those third agers with outreach work and taster courses targeting underrepresented groups.

To sum up, the UK has at present a considerable range of formal (and informal) education, and many third agers make good use of these opportunities. But there are some major concerns which need to be addressed:

- There needs to be even more emphasis on short, affordable, congenial and accessible courses, responsive to the needs of third agers of all backgrounds, and particularly including social classes D and E. This should include both local adult, further and higher education, and also distance learning through television and radio.

- We accept that those who can afford to contribute financially to the cost of provision should do so, but are loath to advocate financially means-tested assistance. An alternative way of targeting financial assistance would be to give some small entitlement to those who left school early and are without qualifications, and to subsidise "taster" courses so that those who are dubious about whether formal education is for them can give it a try. This targeting would be important both for the present educationally deprived third age cohort, and for the continuing deprivation amongst the least well off. Priority should also be given to the expensive work of outreach, building on present good (and successful) practice.

- There is a considerable risk that present policies may lead to fragmentation and contraction of precisely those parts of the adult education system – local authority, FE, WEA and extra mural – which are most cost effective in providing a wide range of opportunities locally and accessibly. The situation needs close monitoring and positive early action.

- In the longer term, there needs to be a basic rethinking of education policy, redressing the balance between full-time initial education and part-time courses available and relevant to adults of all ages and backgrounds.

Once again, these conclusions are self-evidently applicable to second as well as third age learning. The core of the argument is not so much to promote provision for the third age as such as to urge that the present discrimination against older people should be overcome.

4.3 TRAINING

4.3.1 THE PRESENT SITUATION: A RECAPITULATION

The material presented in Part 1 shows that the proportions of **older people at work who are receiving training** are lower than for younger age groups. Overall, some nine out of ten older workers receive **no training at all** in any given year. In 1990 10% of 50-54 year olds had received training the previous four weeks, 4% of 60-64 year old men. The proportion has however doubled between 1984 and 1990, a faster rise than for younger workers. There is no great difference between those men and women who are in employment; indeed older women do better in terms of prolonged training. But there is a sharp social class differential; in 1990 the proportion of those with no qualifications who had received training in the previous four weeks was 3% for those over 50, compared with over 20% for those with higher education qualifications. Indeed social class has a greater impact than age; educated third agers do better than second agers with no qualifications.

This does not reflect the attitudes of older workers. A substantial majority of those over 50 disagreed with the statement that "training is really for younger people or those entering new jobs". As the employment study shows, it is employers who are often, though by no means always, opposed to training for older workers, because of misconceptions about how far they are trainable and how long they will stay.

For the unemployed training may be crucial to get back into a job – perhaps of a different kind. Here government funded **Employment Training** is crucial. Yet from 1988-89 those over 50 formed only 5% of those entering Employment Training. This is not surprising given that 18-24 year olds unemployed six months have a guaranteed place, and 25-50 year olds unemployed for two years have priority. Since long term unemployment disproportionately affects older workers their virtual exclusion is a serious matter. In terms of outcomes, the success of Employment Training as an entry into work or other activities is not markedly different for older and younger workers; half of each group end up unemployed, and about a third in paid work. There is a question mark against the validity of unduly narrow outcome measures which focus exclusively on securing paid work, when the benefits of confidence-building and an enhanced capacity to learn may be significant.

Quality continues to be a matter of concern. There is evidence that Employment Training is aiming rather low in its skill levels. More generally, few employers have systems in place for evaluating the effectiveness of their training. It is not only a question of the volume of training, but of ensuring that the skills acquired can be properly put to use, with training planned and managed in a context of overall organisational change. This entails in turn training for managers so that they can relinquish stereotypes and develop coherent overall human resource strategies.

For some segments of the population there are some very promising initiatives – for example Rover's Learning Business and the Ford EDAP scheme. Firmly rooted in commercial considerations, these are based on the principle that a workforce which has the learning habit is best placed to compete successfully. Some parts of industry, in other words, are striving to broaden the educational base of their employees. Older employees may benefit from this, though there is little evidence of specific efforts being made on their behalf.

4.3.2 FUTURE PROSPECTS

The employment study suggests that a huge shift will be needed in the attitudes of most employers if older workers are to receive the training which would not only be desirable from an individual point of view but also in terms of an economic return.

For those out of work, responsibility for providing employment training rests with TECs and LECs. The survey carried out for this study, and other material, shows that some have taken specific initiatives on older workers – looking at needs, employer attitudes, and provision – and in some cases actually embarking on awareness campaigns, careers guidance, special training provision tailored to older workers, and skills assessment services for employers. However most have not yet gone down this road, and it must be unrealistic to expect much for older workers, given the priority for younger workers within budgets which have recently been further constrained.

Unless prospects can be greatly improved, the situation is bad for the UK economy and for individual third agers. In economic terms, we invest less in training than our competitors; and the training which is available tends to be concentrated on those who are better qualified to start with, leaving those with minimal education to remain unskilled. If the UK is to have an increasing high value added economy, there will be ever fewer jobs for this group; work will only be available in so far as we compete through cost-cutting and low wages. From the point of view of the individual, the outcome is poorly paid work, perhaps with frequent or long periods of unemployment, and entry into the third age with low pension entitlement and saving, little prospect of paid work, and lack of the skills and experience to build a worthwhile life when paid work ends. All this amounts to a massive waste.

As with formal education, the points made here apply to the second age as much as to the third age. In the case of formal education, we argue for a shift in priorities – towards lifelong learning, more short, local and part-time provision, and a "fair share" for third agers. In the case of training, the arguments are overwhelmingly for more resources to be given to training, both on the job and through ET, and for older workers to have as much access as younger ones to these expanded opportunities; so long as training remains at its present levels, it is almost inevitable that young and "prime age" people should continue to have priority.

There are clear signs of movement in public thinking:

a) The government has recently set itself strategic priorities for action on training (**People, Jobs and Opportunities**, HMSO Cmnd 1810, 1992). These include:
   - Employers must invest more effectively in skills
   - People at a disadvantage in the jobs market must be helped to develop their abilities to the full
   - Providers of education and training must offer high quality and flexible provision which meets the needs of individuals and employers.

   The White Paper proposes, amongst other things:
   - a comprehensive local information assessment and guidance services
   - development of open learning, with TECs and LECs partnering local library services to make suitable learning materials and back-up services available.

b) Tax relief for people financing their own training leading to NVQs/SVQs is to be made available from April 1992.

c) The Department of Employment's **Investor in People** initiative launched in 1991, requires public commitment for employers to develop **all** their employees.

d) The CBI, supported by the TUC has published its 'World Class Targets' (1991) for young people and for employees. These include, for 1996:

- all employees should take part in training activities as the norm
- at least half of the employed workforce should be aiming for qualifications within the NVQ/SVQ framework
- at least half of the medium and larger organisations should qualify as 'Investors in People', assessed by TECs/LECs.

e) The RSA Summary Report, **Profitable Learning** (Ball, 1992) builds on these, proposing further ambitious longer-term targets, a new funding regime for providers and incentives to employers and to individuals.

The general policy climate therefore appears to be changing, with substantial impetus at last building up behind increased training. On the other hand there is still a significant gap between the rhetoric and the reality, at both governmental and employer level. Moreover, there remain serious doubts as to how far older people will be included in this general improvement. It will be particularly hard to ensure that those who arrive largely unskilled at the third age are seen as legitimate participants in the new virtuous spiral where high investment leads to high quality and high output, which in turn leads to high return to individuals and society – should such a spiral emerge.

4.4 INFORMAL LEARNING AND INFORMATION

4.4.1 THE PRESENT SITUATION: A RECAPITULATION

Over 1.5 million third agers are **learning informally** – systematically following up a particular interest, or finding out how to do a particular task making this as widespread as participation in formal education or training combined. Like formal learning it is most common among the middle and upper classes. The same is true of voluntary work, which usually involved some formal training, and much incidental learning. Overall, informal learning probably has a higher profile in the lives of third agers who are women, those who live in towns and cities, and members of the ethnic majority.

A wider definition of "informal learning" embraces everyone who makes use of new **information**. TV, radio and the press are the most significant "formal" sources of information of a generalist type. Overall, 98% of third age households own a television; 20% have a video recorder – a much smaller proportion than that among households as a whole. Older adults (especially the retired) spend a third of their waking time watching TV. The media – especially broadcast forms – often include material which misrepresents older people and thereby they misinform.

Books and libraries play a central part in the lives of many third agers. The level of reading increases in the third age, as does use of libraries, with over a third of 60-69 year olds claiming to use them at least once a month. The over 65s, in particular, are less likely to buy books than are younger people. There is a clear correlation between household income and the level of expenditure on information and communication services (books, magazines, postage, video rental, etc).

In regard to information services, we have questioned both the content of what is communicated and the extent to which genuine communication takes place. Most older people (especially men) do not actively seek information and information is often unavailable at the appropriate time, in the right place and language, and in a locally relevant form. 86% of third age households possess a telephone, and 40% a car; those living alone and/or on state pension only are much less likely to have their own telephone or vehicle. Older adults most in need of information and services are least likely to have access to them – particularly the housebound, ethnic minorities and rival inhabitants.

Much information in the media is about goods and services offered by profit-making companies, and is important if older adults are to be effective consumers; the need for comprehensive and independent information on pensions is particularly pressing. Most information on facilities for older people with urgent needs – usually connected with financial matters, accommodation or health – is provided by public and voluntary organisations, such as Age Concern and Citizens' Advice Bureaux who tend to rely not on the media but on leaflets and telephone services. The retired use advice centres less than younger adults. Current practice in the production and dissemination of non-commercial information often seems to involve a degree of inefficiency, with too little regard being paid to existing research findings on design, language, etc, and too little research into local needs.

It is in the field of health education that most attention has been paid to reaching those who need information, and to encouraging them to act on it. National campaigns have been reinforced by local programmes, and individuals encouraged to participate in developing their own wellbeing.

4.2.2 FUTURE PROSPECTS

Education guidance workers predict a growth in the numbers of older adults seeking **accessible** opportunities. Whether or not formal education/training becomes harder to come by for third agers, an increase in the extent of informal learning is highly probable, particularly within self-help learning groups, and also in other voluntary organisations. Those educational institutions which currently provide rooms – and sometimes other support – free of charge to such informal groups are already coming under pressure to maximise returns on all their resources. Voluntary organisations serving the community foresee a growing need to attract more volunteers, including older people. This, together with the formalisation of the relationship between voluntary and statutory bodies under community care arrangements, is likely to mean much more widespread training for volunteers, and more widespread accreditation of their skills and knowledge.

There are fears about the effects of charge capping on the future of library services, which are especially important for older adults who cannot afford to buy books and newspapers. Libraries act as a focus for displaying information on local opportunities, and in some cases provide access to computer databases, such as the Training Access Point (TAP) system.

The place of formal education within radio and TV is the subject of active debate currently. On the one hand is the argument that specifically designating certain programmes as educational runs the risk of placing them in an unheard or unwatched ghetto. On the other hand, without explicit recognition the educational component may disappear. Recognition is needed of the potential links between informal provision of information by the media and more structured forms of learning which they can furnish.

Developments in information and communication technologies are set to expand greatly the potential types and channels of information open to third agers, offering an opportunity to reach those who are currently information-deprived (especially the housebound). But there are concerns about those older people who lack the money and/or skills to buy and use the necessary equipment and services. Although only between 1-2% of third age households currently own a computer, a substantial proportion of older people claim to want to have access to one. With improved and more widespread computer-training opportunities for such people, there is the potential for greatly enhanced access to information about jobs, education and training, to general civic and consumer information, and to self-paced learning. The number of knowledge-based expert systems on retirement issues, care services, etc is growing, as is the possibility of much better networking among those working with older adults, and among third agers themselves. At the moment the unregulated proliferation of dispersed IT-based sources of information makes it difficult for providers and consumers to find their way around the "information maze".

4.5 POLICY OPTIONS

4.5.1 KEY THEMES

In none of the three areas central to this report – education, training and information – can we give a definitive answer on achievements and needs. A very broad brush summary would run thus:

a) **Training for older people is extremely limited, and almost non-existent for the unskilled.** This is the product of a combination of a national historical weakness in training; cultural prejudices and misconceptions regarding the skills and potential of older people; and resource constraints. By any standards there are stark deficiencies.

b) **Adult education has many examples of very good practice, yet there is not a secure base for third age education.** There is a significant danger that the multitude of good ideas available will be dissipated in a general erosion of community provision.

c) **Formal education is only part of a much wider set of learning activities.** These need to be seen together in some kind of overall picture. Arguably, however, formal provision constitutes in some sense a **core**. Given the apparent scope of informal learning, a better understanding is needed of the relationship between different learning activities, and especially of how this affects the social distribution of opportunity.

d) **Future needs will be more diverse, as more people become third agers and the patterns of employment and other activities become more complex.** Maintaining the *status quo* would be highly unlikely to meet these needs satisfactorily.

e) **There is a huge amount of personal testimony to the value and effectiveness of education** – so much so that it should not be labelled 'anecdotal'. Nevertheless, evidence on outcomes is not yet gathered sufficiently systematically (by third agers themselves as well as others) to inform policy-making and to improve practice as well as it might.

Despite the range of agencies involved and the diversity of the field, a small number of **key policy** themes emerge as common to virtually every area. These are:

a) The need for clear **policy statements**. On their own these are of symbolic importance, but need to be supplemented by:

b) The setting of **targets** (within defined timescales), and the establishment of **monitoring** machinery.

c) Appropriate **resourcing**, whether this be at the level of a national training scheme, local authorities, an institution, or for individual students, sufficient to ensure a **broad range** of opportunities

d) The need for **guidance and information**, specifically relating to learning opportunities but also to employment opportunities.

e) The relevance of a supportive **cultural infrastructure**, enabling older people to have effective access to the media and other resources, as contributors as well as consumers.

f) The need for **consultation** with older people and their organisations.

g) A final theme is of such crucial importance that it requires special emphasis. **There is a major danger that the advantages and opportunities of the third age will be concentrated among limited segments of the population.** All the options below need to be reviewed in this light.

4.5.2 SPECIFIC POLICY OPTIONS

4.5.2.1 Training

a) **At governmental** level:

  i) **A clear statement of policy on the training of older workers.** This might be set in a general statement of **anti-discrimination**, but it would need to set out to dispel stereotypes and prejudices about the existing abilities and future potential of third agers. The government has effective responsibility for shaping the priorities of the TECs in this respect.

  ii) **Training for older workers to be regarded as part of continuing education and training.** This would mean, as a first step, the removal of the discriminatory rules governing **Employment Training**, which exclude older workers from both guarantee and aim groups.

  iii) **Targets to be set for the training of older workers.** These might be expressed in terms of **annual participation rates** and of **volume of expenditure**. The targets would have to be realistic, but at the same time raise aspirations. (There is a danger that targets set too low would actually depress performance). They might be general, but also relate to specific groups, e.g. older women without formal qualifications.

iv) **Governmental action to increase spending on training for older workers,** such as:

- enhanced resources for **TECs/LECs**
- further support for **tax relief** on vocational education, along the lines of the measure introduced in the 1991 budget but enhanced and targeted to older workers
- the introduction of a **training levy** drawing on experience elsewhere, for example the French law on *formation continue*
- specific expenditure earmarked for older workers in **declining industries** or **regions in economic difficulty,** for **women returners** and for the **long-term unemployed.**

v) **An educational entitlement as a new version of educational release from work.** This could mirror the (unsuccessful) attempt in the 1944 Education Act to provide day release for all young people. For third agers the provision would need to be more flexible – perhaps an entitlement to a given number of days per year over a period of a decade. The entitlement might be triggered at the age of 50, with priority given to those with least initial education.

vi) **Further support for guidance systems.** The importance of guidance is recognised in the recent White Paper and needs to be given concrete backing. For older workers it will be particularly important to have an effective **local** network which brings together TECs/LECs, the Careers Service and voluntary organisations.

vii) **The 21 hour rule to be amended.** This would encourage rather than discourage study during periods of unemployment. The relationship between support for training and DSS funding to be reviewed.

viii) **Finally, the government as employer to ensure that its practice is exemplary in relation to the training of older workers.** This would have a direct impact on thousands of employees in the Civil Service, NHS and so on.

b) **Workplace***

i) **Employers need to make clear statements of policy in respect of older workers**, asserting an anti-discrimination position.

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* i) Training is linked to organisational development. Relevant issues such as the modification of career structures and pension arrangements to allow more flexible patterns of retirement are dealt with in the employment study.

ii) This section does not distinguish between individual workplaces and TECs/LECs; many of the options apply at both levels. In many instances the CBI and the TUC have an important role in promoting the policies.

ii) **Regular targets to be set for the training of older workers,** on participation and expenditure. These should form part of the national training targets already established, and be based on more systematic **training needs analysis.**

iii) **Monitoring procedures to be installed**, so that declared policies can be reviewed and progress in meeting targets assessed. This should include evaluation of the benefits which ensue from investment in the training of older workers.

iv) **Negotiated agreements on education and training to be supported,** complementing the educational release entitlement suggested above and initiatives such as Investors in People. Such agreements should cover as **broad** a range of learning opportunities as possible, since older workers will often be less interested in learning that is closely tied to future career qualifications. Literacy, numeracy and communication skills might be priorities.

v) **Greater use to be made of older workers as trainers and mentors,** capitalising on their accumulated experience.

vi) **Greater recognition to be given to prior learning especially experiential prior learning,** i.e. learning which has taken place outside formal education or training. This is gaining ground generally, but has particular salience for older employees.

vii) **Personal development plans to be supported,** designed to help employees map out their future careers. For older workers, these should include much stronger provision for **pre-retirement education** or perhaps **third age education** covering not only information on finance, health, personal relationships and leisure but also skills to do with volunteering and with (mainly part-time) participation in the labour market.

viii) **Links to be built up with third age employment agencies,** which are to inform older workers of job opportunities and act as advocates to employees on their behalf.

4.5.2.2 Education

a) **Government (national)**

i) **A clear policy statement on the rights of older people to a broad range of educational opportunity.** Whilst this might be phrased only in general terms, it would be an important assertion of the status of third agers as full participants in society.

ii) **All relevant educational bodies** – most particularly, local education authorities, the Higher and Further Education Funding Councils and their constituent members – **to have a clear obligation towards adult**

learners, including older adults. This obligation will take different forms at different levels. For the Funding Councils, for example, it would be a matter of setting priorities through financial incentives to support suitable institutional policies and practices, notably in earmarked support for continuing education with a specific outreach character.

iii) **The duty on local education authorities to secure sufficient provision of adult education to be confirmed, accompanied by adequate resources.** If capping is to continue, central government should admit a level of local financing which allows LEAs and others not only to make statutory provision for schools but also to be able to have a reasonable budget for adult education. Formulae such as the Standard Spending Assessment should acknowledge the particular needs of older learners.

iv) **Financial support to be significantly reweighted in favour of part-time provision.** This applies both to the financing of **institutions** and of **individuals**. In higher education the fee-grant system to be reviewed in this light. More generally, discretionary awards for part-time study to be increased.

v) **Coordination of and support for distance learning providers** – (preeminently the Open University, but also the Open College of the Arts, National Extension College, etc) – with particular reference to older learners with problems of mobility. This would include incentives for education institutions which are not themselves providers of distance learning to collaborate in this, for example in the provision of tutorial support groups or of access to physical resources such as libraries and to IT.

b) **Government (local/regional)**

i) **Local authorities to prepare an explicit policy statement on older learners,** interpreting and complementing statements at national level.

ii) **Local authorities to set and monitor targets for participation**, to be expressed in terms of numbers or proportions of local population groups, together with more qualitative goals.

iii) **Local authorities to ensure that as broad a range as possible of learning opportunities is offered to older adults**, recognising that genuine breadth can only be achieved by major efforts to enable potential students to articulate their needs and participate in curriculum development. Full use should be made of school buildings, in the evening and during school holidays.

iv) **Local authorities promote collaboration between education and other local/regional services, notably health, social services and voluntary organisations.** Such collaboration might take place at policy/ management levels, with joint planning groups; but it might also take such forms as cross-placements of staff and joint professional training both initial and in-service.

v) **Financial support and fee policies to be designed to help those with least initial schooling and those who cannot afford full (or even reduced) fees.** A review is needed of the effective targeting of financial support, recognising the tension between universal and selective support.

vi) **Local authorities support local education guidance networks and services, combining comprehensive information with advice and access to taster courses.** This should be acknowledged as especially important for certain groups, notably ethnic minorities, where mother tongue guidance is often needed.

c) **Educational Institutions**

i) **Institutions to issue a policy statement which defines their general attitude to older learners, but which also sets a framework for admissions, curriculum development and evaluation.**

ii) Where institutions commit themselves seriously to meeting the needs of **older learners** they will need to consider:

- outreach initiatives **to reach groups who are not in the learning habit**
- scheduling and location **of provision**
- appropriate learning environments
- curriculum development
- guidance and information

iii) **Staff development will almost always be needed,** at several different levels: from senior management to receptionist.

iv) **Institutions will need to consider how far they make separate provision for third agers.** Different institutions will follow different policies in this respect, and rightly so, but the outcomes of these different policies should be properly monitored.

v) **Institutions to take a positive approach to partnership with informal and voluntary providers,** for example on oral history and intergenerational work.

4.5.2.3 Information and Informal Learning

a. i) **Local** and **national information audits** to be conducted to explore the information needs of older people with special reference to content and accessibility.

ii) **Local library services to be properly supported in recognition of their crucial role in relation to older people.**

iii) **The identification or establishment of local agencies to coordinate information networks geared to local needs.** These might most appropriately form part of and be located in the library system, but would use a wide range of outlets, including bingo halls and other recreational premises and GP waiting rooms.

iv) **Government bodies to improve their supply of information.** For example, The Post Office should be encouraged nationally to display community information free of charge and the DSS to supply more information in pension books.

v) **A feasibility study to be carried out on a national unit to analyse and meet the information needs of older adults.**

b. i) **Both public service and commercial broadcasting to offer a wider range of learning opportunities for older people especially in the light of the increasing number of channels available.** This would include serious reflection on the images offered of older people.

ii) **Franchising policies for radio, TV and cable networks to require the provision of community programmes which do not depend on advertising revenue appeal.** This covers the new Broadcasting Act, with the competitive auctioning of C3 licences, the forthcoming renewal of the BBC charter, and the privatisation of Teletext services. Resources to be earmarked for educational purposes, whether or not they are committed to specifically 'education' programmes.

c. i) **An initiative to promote the wider diffusion of information and communication technology among older people,** expanding on current local authority provision of telephone services for the disabled. More fundamentally, further exploration is needed of what constitutes appropriate ICT – appropriate in terms of price as well as technical sophistication.

ii) **Providers of "commercial" information to operate within rigorous guidelines to ensure that information is genuinely comprehensible.** This is especially important on issues such as personal finance.

d. i) **Government funds to be available to voluntary organisations to enable them to provide more and improved training and APEL for volunteers.**

ii) **Support for research into the potential and the effectiveness of education and training for older adults.** Longitudinal studies are needed to analyse trends over time and to distinguish the effects of age from cohort or generation effects. More immediately, systematic analysis is needed of the effectiveness of different forms of provision, including a full mapping of direct and indirect outcomes.

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This has not been a visionary report. It has been, for the most part descriptive and condensed, with no attempt to colour in a future where older people are enabled to realise their potential, drawing on the huge wealth of latent learning opportunities which the future can offer. The voices of the third age have been mute; there has been no space for them to articulate their own sense of the future.

As authors from the second age, we have written the report in a spirit of intergenerational solidarity. We choose the phrase, cumbersome as it is, not so much because 1993 is the European Year of the Elderly and Solidarity between the Generations as because we have become increasingly aware of the loss to everyone if the case for learning in the third age is ignored. We have alluded briefly to the costs, economic, social and cultural. We are not proposing a transference of vast public funds – in some areas, notably local authority provision, a little extra will make an enormous difference. The case is overwhelmingly an ethical one, not in the benevolent paternalist sense that here is a segment of society which requires to be treated fairly but in the sense that society itself will be diminshed if it lets the chance go by default.

We are aware that there has been a constant tension in the analysis, as maybe there is in the Inquiry as a whole. Our task has been to focus on older people, seeking out data, research and views which deal specifically with an age group or groups. But underlying all this is a belief that chronological age is a grossly overused instrument of social division. To concentrate only on those aspects which mark third agers out as older people would be to reinforce precisely the attitudes which are at the root of many of the problems. We have not resolved this dilemma.

We repeat that attention to the needs of the third age has much to teach the rest of society. We need to acknowledge the interplay among all forms of learning, formal and informal, instrumental and expressive. But the potential of the third age as a source of skill, wisdom and creativity is a huge and immediately available resource. The investment required to tap it is, by comparison, miniscule. For once, the short term and the long term coincide.

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APPENDIX – SUMMARIES OF FIELDWORK

a) SURVEY OF EDUCATION/TRAINING PROVIDERS – SUMMARY OF FINDINGS

From March 1991 onwards questionnaires were distributed on an *ad hoc* basis to a range of providers (excluding those training volunteers – see separate summary). Out of about 100 distributed, 20 have been returned, over half from within Scotland. The following summarises the findings from the questionnaire. The central questions under investigation in this area have also been raised in letters to other providers, and in a series of detailed interviews/case studies with providers in different parts of the UK. Responses in these cases reflect those reported below.

Respondents included Community Education Services staff, AE/FE/HE colleges; a multicultural centre; an industrial training association; a private training agency; a retirement council; a housebound learners scheme; the WEA; a university settlement.

Three-quarters reported changes in attitudes/practices relating to work with third agers within their institution/organisation over the past 5-10 years, with greater recognition of need/demand from older adults, and positive steps being taken to meet it. As yet, however, less than half have a specific policy for this area of work. The proportion of older learners varies widely from institution to institution; about half run programmes catering specifically for this age group (pre-retirement courses; local history/reminiscence; computing; drama/music/photography; assertiveness; communication skills, etc). In mainstream provision, third agers are strongly represented in non-vocational courses – particularly arts, crafts, exercises classes. The vast majority offer fee concessions for older people on low incomes, and some provide free tuition – for outreach work in working-class areas or with Travelling People, for example.

Almost all cited positive results arising from the education/training of older adults in their organisations: increased confidence/self-respect; heightened interest and participation in the community. Around a third pointed to negative outcomes – individuals' inability to fulfil their expectations as to further training/education, and the reinforcement of negative stereotypes within age segregated groups. Informal methods of evaluating the effectiveness of provision (discussion, observation) feature more prominently than formal procedures (questionnaires, certification).

Examples of current good practice in this field include the Community Education Services in several Scottish regions, especially where a development officer for work with older adults exists (work includes outdoor education for older adults and cross-generational projects in primary schools); self-supporting/highly participatory courses; reminiscence/local history courses; drama projects (including intergenerational work); in-house training schemes in retail multiples.

The criteria used to identify good practice cover all stages of the process. Planning should consider possible ageism in the type of activities offered, accessibility, and overall aims. Learners themselves should be involved in planning and evaluation, and their prior

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experience valued throughout. As a result of participation, they should be stimulated, empowered, and their quality of life enhanced. Course attendance and outcomes should be assessed/monitored.

Two-thirds of respondents anticipated an increase in demand for education/training among third agers during the next 5-10 years, but a quarter were pessimistic about the supply side, especially in regard to non-vocational adult education, and for those on low incomes. Ideally, many would like to see increased provision, not only within educational institutions, but in the workplace, with more employment opportunities for older people. There were also calls for more daytime classes/negotiated or experimental courses/ outreach work/ redundancy counselling, and for improved opportunities for ethnic elders, Travellers and other marginalised groups. One suggested a mass media promotion of educational opportunities which challenges stereotypical views.

Overall, the greatest difficulty facing those over 50 who want to learn are attitudes (third agers' and those of society in general), with the practices of providers being seen as less important, and the individual's situation regarded as least significant. However, a third then went on to say that changing attitudes towards older people in society as a whole, and among employers, would be the single most important step forward in encouraging participation in learning. The other major type of step recommended relates to changes in national policy governing educational provision. Similarly, in discussing barriers to paid employment for third agers, employers' attitudes were highlighted, set in the context of society's approach in general, and the current recession.

As for the most important sources of (daily) information used by this age group – respondents identified TV, radio and newspapers in particular, followed by social networks, then libraries, health/community centres, churches, other groups.

b) FIRST SURVEY OF USERS – SUMMARY OF FINDINGS

As with education/training providers, questionnaires have been distributed to consumers in educational institutions on an *ad hoc* basis, as part of a "Toolkit" for use with groups of older learners. Over 150 Toolkits have been issued, and 207 questionnaires have been returned (together with 13 co-ordinators' reports), mainly from 20 different groups in various parts of England and Scotland: pre-retirement and adult education courses; informal learning groups and women's groups; Second Chance courses, and lunch clubs. (The researchers themselves carried out a small number of group discussions with third age students, and with older employees in the workplace.)

Questionnaire respondents were mainly aged between 60 and 70, with the 70+ group being next largest, and the 50-59 group the smallest. There were twice as many women as men. Most were retired (mainly clerical/secretarial jobs; teaching; nursing/care assistants; civil service/local government). A fifth were still in employment, full- or part-time (mainly teaching; civil service and management/administration). Only 5% described themselves as housewives. The general pattern reported was of work-related education/training soon after leaving school (half the sample), with learning for leisure/ life skills later in life, although a small number had done vocational training and/or leisure classes throughout their life. Less than one in five had received higher education, a third of these in later life (particularly OU degrees). The vast majority of third age education/training reported was non-qualifying. Around 8% mentioned recent training for voluntary work (for ABE tutoring, and work in the CAB or hospitals).

A very wide range of leisure classes were currently being taken, mainly in liberal arts subjects (particularly arts and crafts, music, languages and history), with many participating in personal development and/or sports/fitness/health activities. Most mentioned subjects they would like to do in the future, especially languages, arts and crafts, and computer skills. The outcome of participation was overwhelmingly positive, and included: increased social contact; acquisition of new knowledge/skills; enjoyment; increased general well-being/satisfaction; new interests, and mental stimulation.

The barriers to participation (and the steps which could boost this) involve provision of: affordable classes; more publicity and taster sessions; more local provision; better transport; more daytime classes; improvement in attitudes towards older adults in general, with more encouragement of learning among the over-50s. Employers should promote education and training among their older workers, allowing time off for study. The preferred learning environment is informal and welcomimg.

Asked what prevents older adults from finding paid employment, most cited the unwillingness of employers to take on the over-50s, some specifying employers' reluctance to pay more for experienced personnel, or to finance training for older employees. High national unemployment levels exacerbate employers' bias towards younger people.

The main sources of information listed were print media (national and local papers, books and magazines), followed by TV and radio. Libraries were an important information channel for this sample, as were educational groups. Many mentioned word of mouth, and also community/social centres, clubs, and information offices (CAB and local authority). Only two respondents cited GPs or health centres, suggesting that this sample of participants do not make much use of such services.

c) SECOND SURVEY OF USERS (WANDSWORTH & NORFOLK) – SUMMARY OF FINDINGS

In November 1991 6000 self-completion questionnaires aimed at third age participants in adult education were prepared for distribution in two contrasting areas of the country. These were inner city Wandsworth (via Wandsworth Adult College) and Norfolk (via the County Council's Adult Education Service). It is not clear whether all 6000 questionnaires were finally distributed, since this responsibility was devolved through managers to course tutors, all acting on a voluntary basis. By January 1992 a total of 880 completed questionnaires were returned (a higher rate would have required resources for direct individual delivery to respondents by the researchers, or by direct interviewing). The research proceedure used produced a bias towards those engaged in non-vocational adult education, who were literate in written English, and motivated to respond.

Around two thirds of the completed questionnaires came from the Norfolk area; three quarters of all respondents were female, and half the sample was aged between 60 and

69, with a quarter being 50-59 and a fifth 70 and over. The vast majority were white, with English as their first language. 59% were retired; 12% in part-time employment; 8% in full-time employment; 11% were housewives/home managers; 2% were unemployed seeking work, and 2% were unemployed for medical reasons.

According to current/last main occupation, over a third were in SEGs A and B (professionals, employers and managers); just under a third were in C1 (intermediate and junior non-manual), with a combined total of 10% in C2, D and E (skilled manual, own account non-professionals, semi-skilled manual, personal services, and unskilled manual). A further 13% were/had been economically inactive. Compared to 50-64 year olds, more of those over 65 lived alone: 19% and 39% respectively. Overall 20% said they had dependents living with them. 45% were educated to degree or diploma/ professional level (55% of those aged 50-64), although a quarter had no qualifications (33% of those 65 and over).

Overall, half the respondents were undertaking programmes of 1-3 hours a week, and short/one term courses, or courses lasting between two terms and a year, predominated. However 15% were doing courses lasting more than a year (usually of the 1-3 hours per week variety). Traditional liberal adult education subjects predominated - history, literature, arts and crafts, languages - with many also taking part in keep fit/sports, creative writing and computing courses. It appears that around half of current/recent participants attended courses in local colleges or schools. Community centres provided a further 20%, while the incidence of distance or workplace learning was minimal.

The results suggest that women have clearer goals in mind than men when embarking on a course and that these relate in particular to opportunities for paid and unpaid work, to improving their health and confidence, to making new friends, and to having time away from home. Women are also more positive about the outcome of participation.

Overall 53% of respondents claimed to be engaged in informal learning. A wide range of topics were mentioned, similar to those studied in organised courses, but also including knowledge gained in caring for a handicapped person, from participating in voluntary work and from organising sports events.

d) SURVEY OF UNIVERSITY OF THE THIRD AGE - SUMMARY OF FINDINGS

With the University of the Third Age, rather than supply a questionnaire as such, in summer 1991 we circulated a list of questions which we asked U3As to use as the basis for an account of their development, their activities and their views. 75 accounts were received (out of 140 U3As contacted, with a total membership of over 17,000) - mainly compiled by executive committees, but some after consultation with all members.

U3As which responded had been in existence for between 1 and 10 years, with membership ranging from 7 to 560 - the average being around 175 - mainly consisting of the over-60s. Larger ones tended to set up offshoot U3As because they felt it was important to keep themselves small enough to allow a sense of fellowship among members. Some had waiting lists for their classes. Membership was predominantly white, middle-class, and professional. A small number actively tried to attract those from the working-class and ethnic minorities. There were many more female than male members.

No members were in full-time employment, but at most U3As a small percentage had part-time work (usually teaching of some kind), and/or did voluntary work. Most said their members were not interested in finding full-time work, were happy to be retired, and believed that education is valuable for its own sake, and not simply for utilitarian ends. Education should be informal and enjoyable. "Training" was regarded suspiciously; it may be a means of exploiting third agers, leading them into menial jobs. Asked what prevents older adults from finding paid work, should they want it, U3As suggested several interrelated factors: "age"; the attitudes of employers (specifically their lack of flexibility and imagination, and their preference for younger workers); low pay; the fact that the only opportunities available are for unskilled/menial jobs; the structure of pension schemes.

Apart from their main programme (usually a monthly meeting with a speaker, plus regular small interest groups and visits to places of interest), several U3As also held meetings in local residential homes, sheltered housing or day centres, with varying degrees of success. Many actively encouraged members to contribute to the community via voluntary work. Some had schemes to ensure that members support one another, especially when ill. London U3A (the largest) ran study groups in the homes of those with a physical handicap, and used telephone conferencing facilities for joint study.

As for outcomes, some emphasis was put on the mental stimulation provided by involvement in a U3A, although overall more prominence was given to the social and personal benefits of membership, particularly for women on their own. The *camaraderie* created could sometimes mean a reluctance to invite new people to join, especially those from different backgrounds. Involvement brought a sense of purpose and a structure to life. U3As gauged their success through the positive feedback of members, low drop-out rates, and the existence of waiting lists.

Asked about barriers to participation in U3As, most felt that there was a lack of publicity, and that the title "University of the Third Age" was offputting (several of those affiliated to the Third Age Trust had adopted a different name for this reason). Several mentioned lack of suitable accommodation for meetings. In regard to participation in adult education in general, they referred to the high cost of classes, problems with transport, lack of daytime provision, and the need for more publicity locally. They also cited third agers' lack of confidence, their fears about "formal education" and the curtailment of courses attracting only small numbers. However, many U3A members did attend classes at educational institutions, or followed OU courses.

These U3As studied liberal arts-type subjects in the main, although some offered fairly unusual topics such as anthropology, dream analysis, and group leader training. Many U3As wanted to broaden their subject base, in particular to include practical subjects (pottery, woodwork), or science and technology. But they lacked suitable equipment, premises and tutors. Some called for more support from local authorities and/or national government, or for greater collaboration with voluntary bodies such as Age

Concern. They stressed the need for new attitudes towards the over-50s (and their education and training), with better representation of their interests in parliament, and perhaps a "Commission Against Age Discrimination". They emphasised the value of older adults' experience, their potential for organising their own educational programmes, and for sharing their knowledge with one another (and with other age groups).

U3As indicated that the main sources of information for third agers are TV, radio, newspapers, libraries and word of mouth. Some referred to: Age Concern; CABs; health centres; council/social service offices; churches, and adult education providers. Some wanted to see more TV and radio programmes specifically for the over-50s, and greater access to pre-retirement education as a means of conveying information.

e) SURVEY OF MINORITY ETHNIC ELDERS – SUMMARY OF FINDINGS

The main group of older non-participants researched were those within different minority ethnic communities in the Edinburgh area (although the group did contain a small number of current participants). We were helped in this exercise by an organiser of the Scottish Commmunity Interpretation Development Group. In September 1991 we held a briefing session with seven members of different black and Asian communities (Islamic Pakistanis; Indian Hindus; Indian/East African Muslims; Sikhs; Chinese).

Those attending were formal/informal community workers, or interested "representatives" of the communities concerned. Armed with a set of questions (broadly similar to those used in our other surveys), and supported by us and/or our colleague, five of these chaired group discussions with members of their community. In addition, three other workers were briefed separately and then ran group discussions, and our colleague carried out interviews with two individuals. In all, almost 100 people were questioned, most of them first generation immigrants, and two-thirds of them women. A debriefing session was then held in November. The total sample included a large group of Chinese elders, but the following summary seeks to give equal weight to the experiences and concerns of all the groups questioned. Overall, gender differences emerged as more significant than variations between the communities.

The sample consisted of ex- (in some cases current) skilled workers; the self-employed (running or working in family businesses); housewives; employees in other businesses; and a small number of community "workers"/interpretors. While the majority of men – apart from the Chinese – had experienced substantial amounts of education/training earlier in life, most of the women had not. However, among those who had participated in organised learning at some stage during adult life, women featured more strongly than men, the latter being too preoccupied with work. Womens' participation had increased their skills (especially in English) and their social contact. It tended to be women who pointed to informal/experiential learning activities – needlecraft learnt from relatives, and other skills involved in raising a family.

Of those considering future participation in more formal learning, all ethnic groups – and both sexes – were interested in training to improve their English. Some members sought vocational skills. Women in particular also wanted non-vocational courses, while men mentioned training in basic rights, and spiritual education. Similarly, when asked about the types of **information** needed in daily life, most pointed to help with English, and, because of language difficulties, to help with finding directions and facilities (such as toilets, post offices, buses, etc). Again, advice on basic rights was cited, as well as on financial affairs, immigration, family and medical problems, recreation facilities, education/training and employment opportunities. The main official sources of information used are the Citizens Rights Office, the CAB, community workers/leaders, religious groups, children's teachers, the media and libraries. Informal sources (probably more important) are children, husbands, friends, other relatives, and neighbours.

Those expressing an interest in becoming involved in education/training were motivated by a wish to compensate for earlier missed opportunities and a desire to get what is due to them, to become more independent, and to fill their spare time. In general, they were not sure how far such opportunities were open to them. Those who were **not** interested in education/training claimed that they were too old and/or ill, that they could not (or saw no reason to) achieve educational objectives, and/or that they had other commitments. Other barriers to participation were: fear – of racial discrimination/of appearing inferior; language/transport/cost difficulties; and restrictions placed on women.

In order to encourage participation, providers should offer: more publicity in community languages; more taster sessions; well-trained/respected teachers; a wide range of courses for ethnic communities; informal methods; information on the benefits of participation; classes taught in community languages. (This last, however, was not a unanimous recommendation; others called for tutors, who although bi-lingual, teach in English.) Most of those questioned were not looking for paid employment, but sugggested that obstacles in the way of those seeking it are: age; ethnic origin; lack of experience/ training/ English.

Asked to consider how typical the group's views were of the ethnic community to which it belonged, members pointed to differences between individuals according to employment status, urban/rural origins, state of health, and level of orientation towards home/outside community. In regard to the extent to which membership of a particular ethnic group influences attitudes towards education/training in general, the overall conclusion was that the various cultures value education to different degrees, and that religious beliefs may discourage women (but not men) from participating in organised learning. Discussing the effects of particular ethnic group membership on attitudes towards learning in **later life**, many described a structure involving gradual movement (when forced through ill health) from work into care/education of grandchildren. It is particularly difficult for older women to branch out into new activities, although less so than in the past.

f) SURVEY OF EMPLOYERS – SUMMARY OF FINDINGS

During the summer and autumn of 1991 over 300 questionnaires were distributed to employers, primarily via 3 TEC/LECs – Essex, Glasgow and Lanark. (100 in each area, in all cases mailed to a selected sample of companies covering the range of sizes [number of employees] and industrial sectors within each TEC/LEC.) These TEC/LECs were targeted in order to try and test the climate of opinion, and to investigate practice, in parts of the UK with different industrial profiles. Essex features hi-tech and light industries in comparison with the emphasis on heavy industry and construction in the two Strathclyde areas (particularly in Lanark). Both offer retailing, distribution, financial/personal services, leisure industries, etc. The intention behind including both Lanark **and** Glasgow was to explore any contrast, within one geographical area, between a "traditional" economy and a somewhat more diverse and dynamic one. In all 3 cases, the questionnaire-survey ran in tandem with a more detailed case study of the area, involving interviews with the following: staff at the relevant TEC/LEC; staff at local education institutions/departments; a small number of local employers; union representatives.

This summary focuses on the overall picture emerging from the questionnaire returns only, of which 42 have been received – 22 from Glasgow, 7 from Lanark and 12 from Essex (plus 1 which was requested by an employer in Northamptonshire). Employing organisations ranged in size from 15,000 to 5 employees, and covered: construction/building supplies; engineering/steel fabrication or stockholding; chemicals/pharmaceuticals; electronics; food manufacturing/distribution/catering; furniture manufacturing; office supplies/printing; financial services; retail, and leisure services.

Most reported that under 10% of their workforce was aged over 50. The majority had policies governing the training of staff **in general**, and many stressed that there was no discrimination based on age in their organisation. Only one employee (medium sized chemicals) claimed to have a policy specifically aimed at older workers, which involved offering pre-retirement courses and training for alternative jobs. In most cases, older members of the workforce participated in training to a lesser degree than did other employees; it appears that in more than half of the companies involved no education/training at all was undertaken by third agers. Where it was, courses took up on average almost 4 days per year, at a cost of around £150 per day/employee to the company. The forms of "general" training in which older employees tended to be engaged included training in new materials/techniques, management skills, and health and safety issues. Provision specifically for older workers almost invariably took the form of pre-retirement education.

Around half of the sample said that, during the last 5 -10 years, there had been no change within their company in attitudes/practices relating to the training of older employees. Where developments **had** occurred, these were part of a stepping-up of training for the entire workforce. Overall, employers anticipated an increase in the amount of training being given to all employees, including older workers, over the next 5 – 10 years. The majority would welcome more attention being paid to older people – with a more flexible approach to their employment (recruitment of more over 50s; retraining for different tasks within the organisation; part-time work, extending beyond current retirement age; paid time off prior to retirement in order to develop learning interests). However, several expected to see an increase in enforced early retirements and redundancies.

Several recommended more government grant aid to companies, to encourage the recruitment and training of third agers. Many identified employers' costs as the major factor inhibiting the improvement of education/training opportunities at work for this age group. The reluctance of older employees – to participate in training and/or to change – was another crucial barrier, followed by management's lack of interest in this age group.

On the whole, training for older members of the workforce had produced positive results – increases in morale and motivation, better performance and team work. Most had some method of gauging the impact of the training they provided, but developed forms of assessing cost-effectiveness were rare. Many relied on observation; some carried out performance-assessment of the individual; others focused on overall staff stability and turnover.

Asked about examples of good practice in the education/training of older adults, respondents described particular schemes within their own company, such as phased rundown – fully paid – of workdays approaching retirement (medium sized construction), and the development of an "experienced managers" training module (large financial services). Examples elsewhere included B & Q's policy on older staff, and British Steel's in-house City & Guilds classes.

g) SURVEY OF VOLUNTEER-WORKER TRAINERS – SUMMARY OF FINDINGS

In July 1991 Volunteer Development Scotland (VDS) distributed over 300 questionnaires to its member organisations and to other appropriate groups on its mailing lists. 46 were returned, from a very wide range of voluntary organisations, including several volunteer bureaux/centres/exchanges; Age Concern groups; hospitals; mental health associations; the Red Cross; the Epilepsy Association; the Samaritans; several child/family support groups; the Sitter Service; Community Education offices; the Scottish Corp of Retired Executives (SCORE); the Scottish Retirement Council (SRC); Discovery Award groups; the Salvation Army, the Scottish Association for the Care and Resettlement of Offenders (SACRO), etc.

Volunteers (of whatever age) are engaged in providing direct practical and/or emotional support for the clients of the organisation concerned, or in administrative/fundraising work for the body itself. Many organisations serve elderly clients; two provide education/educational guidance for clients. At present, in almost half the bodies concerned, over 40% of volunteers are over 50, and they form a substantial proportion in most of the others.

Around half the respondents reported no real changes in attitudes or practices in regard to older volunteers during the last 5-10 years. The rest mentioned a greater awareness of the positive contribution made by older adults in their organisation. None of the sample had a specific policy on either the recruitment or training of older volunteers, although many claimed that there is no positive discrimination against them. However, a few of the organisations involved consist entirely of third agers (SCORE, SRC, Discovery Award groups), and a number of others reported recruitment-targeting of older people, whose experience is seen as valuable in the organisation's work (particularly that with families or the disabled).

Overall, around a half provide training (usually the same as that offered to all adult volunteers) for their older workers, and about a third use them as trainers. Much of the training is informal – trainer and trainees sharing their knowledge and experience; some involves formal assessment, accreditation and certification.

Just over half expected to see increasing numbers of older volunteers in the course of the next 5 – 10 years, although others pointed to difficulties in enlisting them. Most would like to see more targeting of this age group in recruitment drives; several suggested pre-retirement courses as one means of doing so. A few called for employers to encourage those nearing retirement to become involved in voluntary work.

The attitudes of older adults themselves were clearly seen as the most important difficulty facing those who wish to learn. Overall, institutional practices were not viewed as particularly significant, and factors due to third agers' circumstances were regarded as least influential. Suggested steps forward in encouraging education/training in general for older people concentrated on: the need for more publicity about opportunities (and about the outcomes of participation); more grants for retraining; more low cost/widely available opportunities; more taster sessions; more self-help learning groups. A minority focused on the need to change attitudes towards education itself, and towards old age.

Of those replying to our question as to the results of training their older volunteers, all emphasised positive outcomes: increased self-esteem/confidence on the part of the volunteer; improved quality of service to clients. Half supplied information on the methods used to evaluate the effectiveness of training – these vary from informal means (verbal feedback from volunteers/clients), to certification, evaluation forms, etc.

Similarly, only about half the respondents offered examples of/criteria for good practice in the education/training of older volunteers. Examples outside their own organisations included: VDS training; the Church of Scotland's training in transactional analysis; the OU's Caring for Older People course; Relate's counselling courses; the Discovery Award; Computer Mediated Communication techniques. Criteria included: the recognition of older volunteers' needs and experience, with these matched to particular training/areas of work; participative training; ongoing support for volunteers from the organisation; evaluation of training outcomes (volunteer's sense of achievement and of potential for further development; volunteer's length of service; client satisfaction).

Employers' prejudice (exacerbated by high unemployment) emerged as the central obstacle facing third agers seeking paid employment. TV, radio and newspapers (especially local papers) are the most important sources of daily information for older adults. Some also mentioned word of mouth, and a few suggested libraries, post offices, DSS offices, and so on.

h) SURVEY OF EDUCATIONAL GUIDANCE WORKERS – SUMMARY OF FINDINGS

The National Association for Educational Guidance for Adults (NAEGA) kindly agreed to distribute 350 copies of a questionnaire in their November 1991 mailing. 41 completed forms have been returned, and while this is a low response rate, the information and opinion supplied is detailed and revealing. All areas of the UK are represented in the replies. The vast majority of respondents work in local authority bodies – usually part of the careers service/education department – many in special adult guidance sections. A small number are guidance workers based in adult education colleges/centres, community schools, a university, the OU, a TAP agency. Two respondents state that they are within private training agencies.

Some tension is apparent in the field as a whole due to the distinction between **educational** guidance and **careers** guidance. While college-based services tend to concentrate on increasing student numbers, those focusing on job placement stress the need for "realism" in advising clients as to the likely outcomes of any course/module of study. Overall, the providers involved in the survey emphasise vocational issues. Even within careers service providers, however, there is a high level of awareness of non-vocational learning opportunities, and, in some cases, of voluntary work possibilities (sometimes suggested as an interim measure in times of high unemployment). There is some condemnation of the artificiality of the vocational/non-vocational divide as perceived by government and employers alike.

All but two providers had no policy in regard to work with third agers, and did not target this group in particular. Several referred to their Equal Opportunities Policy, implying that this precludes discrimination – either negative or positive – in their work with older adults. A few also pointed out that funders (local authority, TEC or ESF) specify particular priority groups, such as the long-term unemployed or women returners.

In three-quarters of the agencies involved, less than 10% of clients are over 50; in most of the remainder, this figure is between 11-20%. Most provide telephone inquiry and drop-in services for all adults, with open access to an information library, together with an appointment/interview system. Several referred to the use of computer-based resources, including psychometric testing. Several mentioned organising group work and courses (career change/pre-retirement); some referred to outreach activities, including special events in the community, and (in regard to older adults) in the form of contributions to pre-retirement courses. The vast majority of providers offer **free** guidance to adults of all ages, although some noted that this situation is under review.

Asked about changes in attitudes or practices in regard to work with the over-50s during the last 5-10 years, the general picture is of a recognition of increasing demand for guidance of all types, due to demographic changes and the growth in redundancies and early retirement. Over the next 5-10 years, most anticipated a growing demand among third agers for guidance, for education/training and for employment opportunities. Most would **like** to see a change in society's approach towards older adults and their abilities, with more avenues open to them in the three areas mentioned. Few however were optimistic about the future availability of such opportunities because of lack of resources, and attitudinal barriers.

The attitudes of employers and educationalists, and to a lesser extent those of third agers themselves, were judged to be the most significant obstacles to participation in both employment and learning. In regard to the latter, situational barriers were ranked second, followed by institutional obstacles. A third felt that more money/resources would be the single most important step forward in encouraging the provision/use of guidance services for older adults; others specified improved accessibility/marketing of education and guidance provision.

The major positive result of their work with older people was that the latter became more aware – of the value of their experience, of all the options available, of the outlook of employers, and of the skills needed to make themselves more employable. The most significant negative outcome was discouragement due to an individual's inability to take up a preferred study or employment option, or to make use of new qualifications. Most test clients' opinions of the services provided, and review the individual's progress several months after interview.

Asked about criteria they might use to identify good practice in the field of guidance in general, several referred specifically to guidelines produced by NAEGA, UDACE and NEGI. Guidance should be free, independent, client-centred, and easily accessible (involving outreach work); information should be comprehensive, accurate and up to date. As to good practice in the field of education/training, this includes client-centredness, ease of access – including appropriate times and costs – and adequate evaluation procedures.

Examples of good practice within guidance included: pre-retirement/redundancy courses; guidance weeks prior to course enrolments; outreach in supermarkets/libraries; leaflets and directories. Examples of good practice within education/training itself included: the U3A; the WEA; the Dark Horse Venture; the PRA; the OU; Strathclyde University's Senior Studies Institute; Ford's EDAP; Ayr's Opportunities in Retirement Group, Mid Kent College's Access course; and leadership training courses for volunteers in third age groups.

The most important sources of (daily) information for the over-50s, excluding guidance services, are: the media, libraries, and word of mouth via friends, relatives, neighbours and workmates.

i) SURVEY OF RESEARCHERS – SUMMARY OF FINDINGS

The two main channels through which this questionnaire was distributed were the Association for Educational Gerontology (100 issued in June 1991) and the British Society of Gerontology (300 issued in September 1991). 41 have been returned – most from England, although all parts of the UK are represented. Respondents work in: universities; adult education institutions; pre-retirement organisations; third age organisations; a third age employment agency; hospitals, etc.

According to respondents, the most important step forward in encouraging the education/training of the over 50s involves changes in the legislature/education system which would make education/training more accessible and attractive to older adults. This would involve increased funding for provision/awareness campaigns, the abolition of the state retirement age, and the outlawing of age discrimination in employment practices. The other major step identified (often seen as a result of the above measures) was changing attitudes – creating a culture where all ages recognise the abilities of third agers, and recognise the benefits of education – for third agers, and for society as a whole.

The interrelationship between these two steps is underlined by the fact that, in regard to barriers facing those third agers who want to learn, researchers saw the attitudes of older people themselves as only slightly less important than the practices of education institutions (the particular **circumstances** of older individuals being regarded as much less significant).

Asked to identify the measurable outcomes of education/training in later life, three-quarters referred to psychological and social benefits: increased self-esteem/sense of purpose/ability to deal with difficulties (one's own or others), and/or to work for change (personal or political). Half pointed to possible economic contributions to society – either "active" (via employment) or "passive" (saving state expenditure due to individual third agers retaining their independence, or due to them doing voluntary work).

Asked for examples of good practice, respondents cited actual organisations – their programme or policy – and/or they referred to particular aspects of policy or practice found in a range of providers. Institutions/programmes suggested included: the OU; Replan; the Senior Studies Institute at Strathclyde University; EDROP; the Church of Scotland; Active Retirement Groups in Ireland; the CHRE/PRA's Managing Change approach; Ford's EDAP; Hammersmith and Fulham's Home Tutor Scheme, and others. The policy statements mentioned were those contained in UDACE's **Learning Later** document, and those of ILEA (now defunct). Specific aspects of policy or practice included: active encouragement of older participants (embodied in Equal Opportunities statements); programmes for older women/the bereaved; return to work courses; research and conferences on learning in later life.

Related to this, when asked to identify what is missing in present provision for third agers, respondents suggested: skills based training; career change courses; pre-retirement education; computer/environmental/women's studies; welfare rights work; ABE. Some were concerned about the relationship between teacher and learner, the level of autonomy among learners, or the need for improved access to higher education. Others called for more research into learning in the third age.

Respondents seemed to identify good practice largely on the basis of what is input to provision – curriculum planning in relation to the needs of local third agers (and employers), and the accessibility and publicisation of courses. Criteria regarding outcome are also important – users' satisfaction and increased competencies, their contribution to the community. Some specified "process" factors, in particular appreciation and encouragement of the participants' contribution throughout a course.

Ageism throughout society, and particularly among employers, was blamed for difficulties older people have in finding paid employment. Finally, the most important sources of daily information for the over 50s are TV, radio and newspapers (especially local radio and papers). The CAB, libraries, health/community/sports centres, post offices and local clubs were mentioned by some, as were family and social networks.

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